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National Petroleum News

1984 fact book

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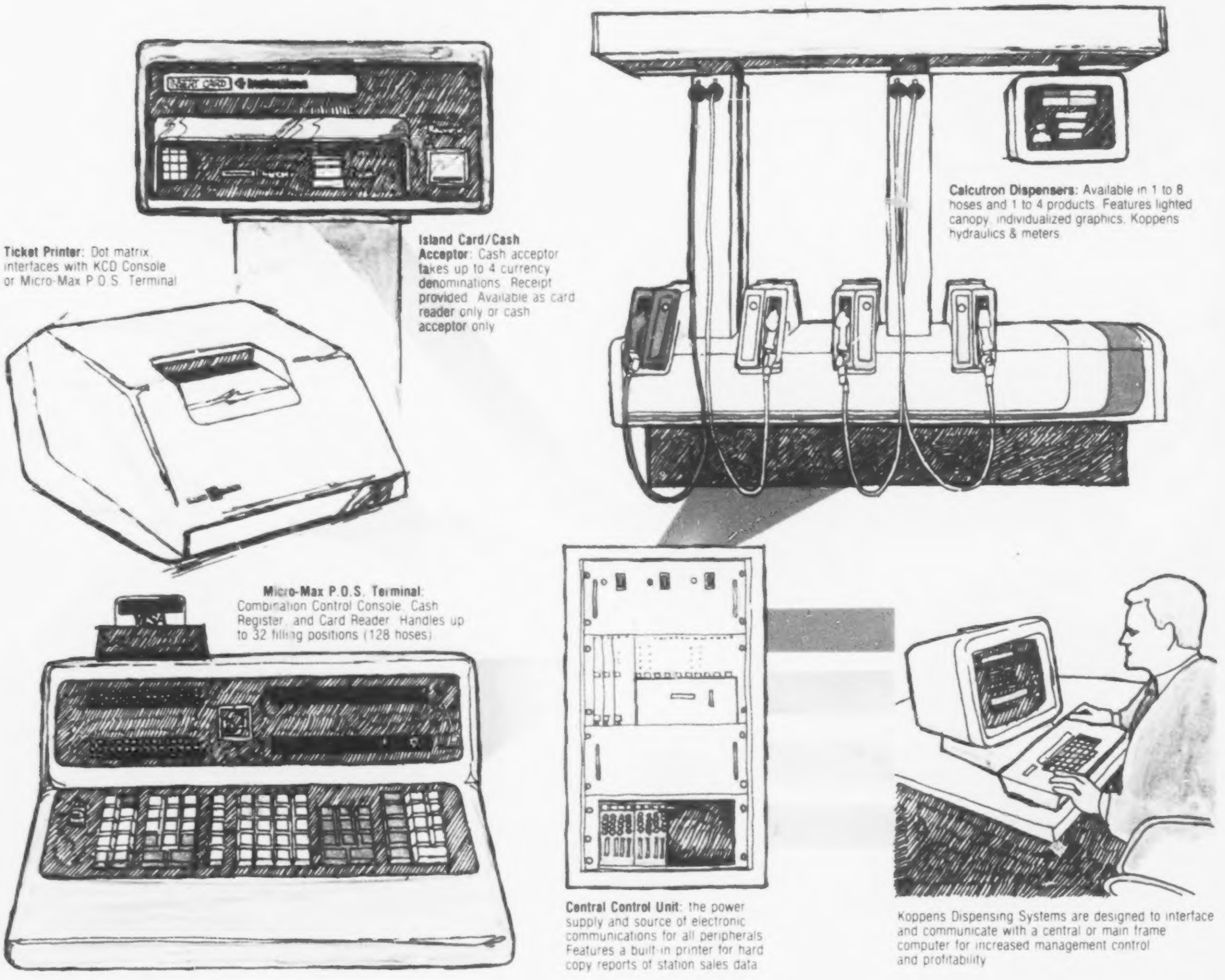

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Looking Things Over

We had hoped right up to the point of no return—the date when the copy flow for the 1984 *Factbook* had to be shut off so the presses could be started and the issue could be printed—that we would be able to include gobs of data from the U.S. Census Bureau's Survey of Retail Businesses. This survey was made in 1982, and the one before that in 1977. So the industry is long overdue in an updating of its statistical measurements. But things simply did not work out the way they should have.

Last fall, for example, a Census Bureau spokesman said things were moving along very well and that the first national summaries would be published before the end of the year—1983, that is. In January, the word was "early spring." In May, the spokesman said the fuel oil data had been tabulated and sent to the government printer but that no one could get copies until they had been re-reviewed and released for distribution. He said that might be four to six weeks.

The gasoline service station data was in even worse shape. The last week in April, Bureau officials were not happy with their findings, so they decided to re-enter the data, rework it and perhaps get a better statistical profile out of the computer. Indications are that it will be mid- to late-summer before the gasoline data is published—long after *NPN Factbook* has been distributed to the thousands of subscribers who prize it as the industry's bible and reference tome.

That is why there is no 1982 census data in the 1984 *Factbook*. We waited as long as we could, but time ran out. All is not lost, however. The principal pages and summaries will be published in various issues of *NPN* this summer and fall, as fast as they become available. You might want to clip them and insert them in the current *Factbook*. That way, you'll have them available until the 1985 *Factbook* gives you a comprehensive report.

There are some other changes in the current *Factbook* that you should know about. The price tables are somewhat different this year. That's because the federal government, as part of its retrenchment program, changed a number of its data collection procedures and the finished results. They do not correspond to the 1982 and earlier tables, so a whole new series is started in this 1983 edition.

Otherwise, the 1984 *Factbook* is chockfull of the traditional materials that many people depend upon to keep abreast of what's happening in the industry. A point to remember: the 1984 *Factbook* is a calendar year effort, so the mergers and acquisitions of late 1983 and early 1984—and the others that are sure to come—will not truly be reflected in the data until next year. —*Marvin Reid*

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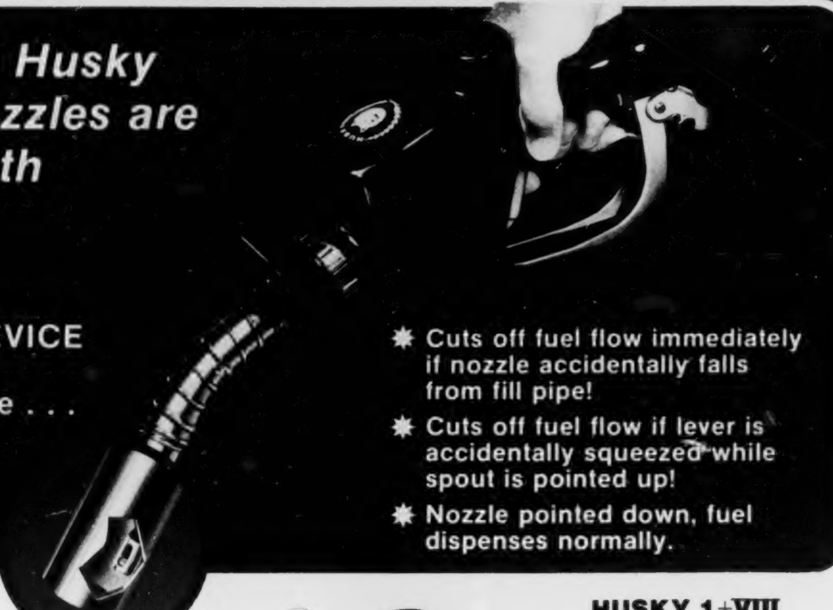

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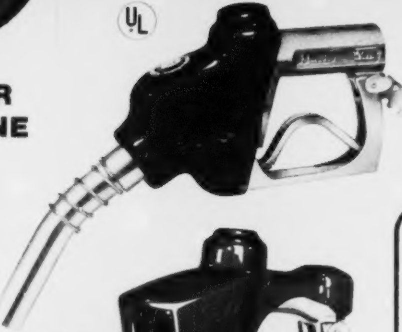

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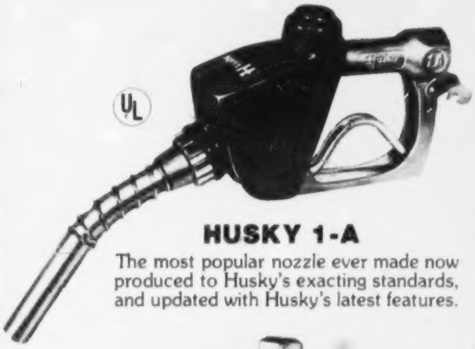

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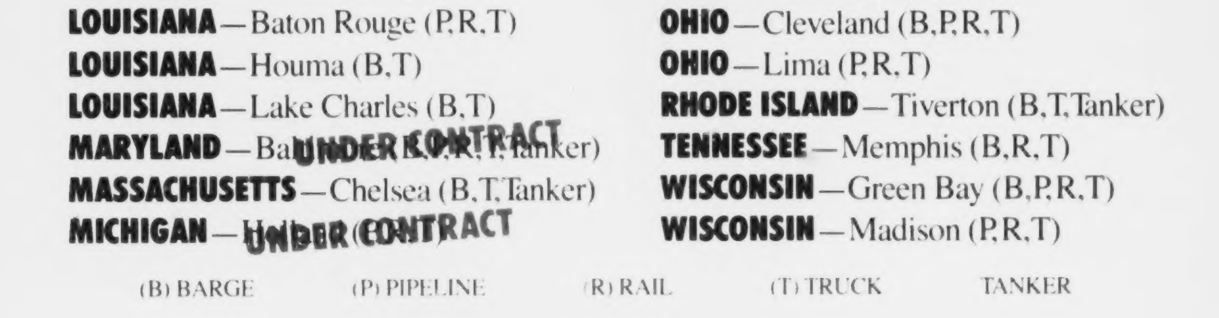

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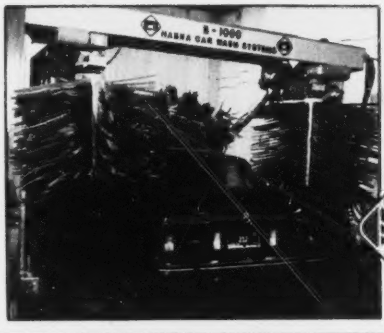
—Bill Bagshaw—Mobil Self-Serve, Newington, CT



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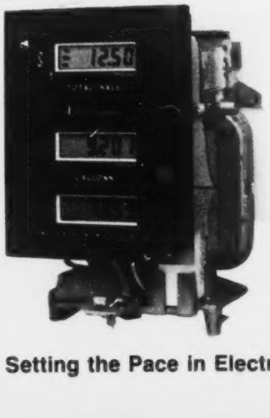

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Mergers Change Face of Industry in '83–'84

Merger fever swept the U.S. oil industry in 1983 and the first quarter of 1984 as never before. As a result, the face of the industry is undergoing a change that is traumatic in depth and scope.

Early in 1983, Cities Service, which had been acquired by Occidental Petroleum, was virtually dismantled and sold in bits and pieces. Southland Corp., the nation's biggest C-store chain, got the marketing facilities and a big refinery at Lake Charles, La. Southland, already the nation's biggest independent gasoline marketer (more than 1.5-billion gal. yearly) thus strengthened its position and its outlook.

But the big news came from Texaco, Chevron and Mobil.

While the heirs to the J. Paul Getty fortune were squabbling over managerial rights and privileges, Texaco elbowed Pennzoil Corp. aside, stepped into the breech with a $10.1-billion offer, and bought Getty Oil Co.

Texaco combined this with a pledge to Federal Trade Commission to spin off the Getty marketing facilities on the East Coast and the Midwest/Mid-Continent Rockies area to avoid antitrust entanglements. Buyer of the East Coast Getty chain was Power Test Corp., of Plainview, N.Y., a fair-sized independent who, if the deal sticks together, will become the largest straight independent gasoline marketer in the U.S. (Southland now owns a refinery, so this changes its status somewhat as a gasoline marketer.).

While all this was going on, a Texas entrepreneur and a group of associates were trying to force Gulf Oil to its knees and accept a royalty trust concept that management would not approve. It made Gulf vulnerable and, rather than submit to T. Boone Pickens and friends, Gulf put itself on the block. Chevron outbid Arco, offering $13.2-billion for the coast-to-coast chain. Like Texaco, it promised FTC that it would divest any and all marketing properties necessary to square itself with the antitrust laws.

Still another big deal was Mobil's purchase of Superior Oil Co. for $5.7-billion. Here again a family squabble made Superior a sitting duck. Since Superior was strictly an exploration and production company, no antitrust problems were anticipated in this acquisition.

The financial people and Wall Street talked of other sitting ducks in the oil industry, citing Phillips, Sun and Amerada Hess among the many out there. But these companies were not sitting idly by either. All were said to have quickly initiated internal programs and financial arrangements to forestall hostile offers and takeover bids.

Profitwise, the industry didn't do badly in 1983. An upswing in the fourth quarter was especially helpful, and at the end of the first quarter of 1984, the money outlook continued to be good.

The industry still had eight companies in its exclusive "billionaires club" at the end of 1983. They were Exxon, Standard of Indiana, Shell, Standard of California, Atlantic Richfield, Standard of Ohio, Mobil and Texaco, in that order. Exxon was at the top, with a net of $4.9-billion and Texaco was at the bottom of the pile with a mere $.2-billion.

Ranking the Top Marketing Companies

	Total Assets		Net Income		Net Sales Ranking Among 500 U.S. Corporations (a)	
	1983	1982	1983	1982	1983	1982
Exxon Corp.	1	1	1	1	1	1
Mobil Oil Corp.	2	2	7	6	3	3
Texaco Inc.	3	3	8	8	6	4
Standard Oil (Indiana)	4	4	2	3	8	10
Standard Oil (California)	5	5	4	7	9	7
Atlantic Richfield Co.	6	6	5	4	12	12
Shell Oil Co.	7	7	3	5	13	13
Gulf Oil Corp.	8	8	9	9	11	9
Tenneco, Inc. (a)	9	9	11	10	19	19
Standard Oil (Ohio)	10	10	6	2	25	21
Phillips Petroleum Co.	11	11	10	13	16	17
Sun Co.	12	12	14	14	17	18
Getty Oil Co.	13	13	13	12	24	24
Union Oil (California)	14	14	12	11	31	28
Amerada-Hess Corp.	15	15	15	18	39	40
Diamond Shamrock Corp.	16	18	21	17	89	121
Ashland, Inc. (b)	17	16	19	19	45	36
Kerr-McGee Corp.	18	17	18	15	108	99
Pennzoil Corp.	19	19	16	16	163	169
Murphy Oil Corp.	20	20	17	20	157	151
American Petrofina	21	21	20	21	176	171

(a) Corporate, includes Tenneco Oil Co. (b) Fiscal ends 9/30
Source: Fortune, 500 largest U.S. corporations, April 30, 1984

Oil Company Annual

	Gross Sales-Operating Revenues (a)				Net Income	
	(Add 000)		% Change		(Add 000)	
Company	1983	1982	1983 vs. 1982	1983 vs. 1978	1983	1982
Amerada Hess Corp.	$ 8,422,076	$ 8,394,085	.33%	78.0%	$ 205,347	$ 168,662
American Petrofina	2,069,122	2,249,167	−8.0	77.0	55,260	54,401
Ashland, Inc.	8,108,000	9,110,000	−11.0	49.4	97,000	165,000
Atlantic Richfield Co.	25,147,000	26,462,000	−4.9	97.4	1,548,000	1,676,000
CITGO Petroleum Corp. (b)	2,871,339	1,259,493	127.9	—	22,731	23,009
Crown Central Petroleum Corp.	1,668,345	1,792,315	—	—	4,024	7,016
Diamond Shamrock Corp.	4,026,107	3,177,379	26.7	510.0	(56,163)	185,091
Exxon Corp.	93,447,000	102,059,000	−8.4	44.0	4,978,000	4,186,000
Getty Oil Corp.	11,600,024	11,970,734	−3.1	230.0	494,314	691,590
Gulf Oil Corp.	28,887,000	30,630,000	−5.6	43.7	978,000	900,000
Kerr-McGee Corp.	3,507,650	3,777,190	−7.1	69.2	118,412	209,764
Marathon Oil Co.	—	—	—	—	—	—
Mobil Oil Corp.	55,609,000	60,940,000	−8.7	41.0	1,503,000	1,213,000
Murphy Oil Corp.	2,388,491	2,602,455	−8.2	1.0	131,907	157,759
Phillips Petroleum Corp.	15,411,000	15,892,000	−3.0	54.6	721,000	646,000
Shell Oil Corp.	20,705,000	20,786,000	−.39	87.1	1,633,000	1,605,000
Standard Oil Co. of California	28,411,000	35,218,000	−19.3	15.5	1,590,000	1,377,000
Standard Oil Co. (Indiana)	27,635,000	28,073,000	−1.6	84.7	1,868,000	1,826,000
Standard Oil Co. (Ohio)	12,067,000	13,529,000	−10.8	132.1	1,512,000	1,879,000
Sun Co.	15,523,000(c)	16,258,000(c)	−4.5	108.9	453,000	537,000
Tenneco	14,449,000	14,979,000	−3.5	617.0	716,000	840,000
Texaco Inc.	40,068,000(d)	46,986,000(d)	−14.7	40.1	1,233,000	1,281,000
Union Oil Co. of California	10,690,500	10,899,100	−1.9	83.0	625,900	804,000

(a) Excluding taxes

(b) Owned by The Southland Corp. Figures are only for the gasoline refining & supply segment—includes Citgo Refinery, interests in pipeline companies, and related wholesale, marketing and transportation facilities, as well as the Gasoline Supply Division, which constituted the entire segment until the acquisition of Citgo on August 31, 1983.

	Product Imports b/d		Crude Imports b/d		Net Crude Production b/d			
					Domestic		Foreign	
Company	1983	1982	1983	1982	1983	1982	1983	1982
Amerada Hess Corp.	—	—	—	—	74,124	76,519	80,451	76,311
American Petrofina	—	—	—	—	18,197	17,696	—	—
Ashland, Inc.	—	—	—	—	2,677	2,725	14,066	13,840
Atlantic Richfield Co.	—	—	—	—	652,800	607,400	41,900	35,300
CITGO Petroleum Corp. (w)	—	—	—	—	—	—	—	—
Crown Central Petroleum Corp.	—	—	16,394	28,283	3,833	3,586	—	—
Diamond Shamrock Corp.	—	—	—	—	29,500	19,300	21,500	—
Exxon Corp.	138,000	134,000	56,000(x)	184,000(x)	781,000	740,000	746,000	627,000
Getty Oil Corp.	—	—	—	—	283,800	279,900	130,000	142,700
Gulf Oil Corp.	20,300	21,000	227,200	238,800	253,300	263,700	253,300	234,800
Kerr-McGee Corp.	—	—	—	—	25,805	25,063	15,491	15,156
Marathon Oil Co.	—	—	—	—	157,300	160,100	89,400	74,700
Mobil Oil Corp.	5,000	1,000	127,000	161,000	304,000	309,000	287,000	268,000
Murphy Oil Corp.	0	0	18,293	8,032	16,605	14,722	47,740	49,926
Phillips Petroleum Corp.	—	—	—	—	127,000	112,000	127,000	114,000
Shell Oil Co.	—	—	—	—	626,000	549,000	202,000	238,000
Standard Oil Co. of California	—	—	—	—	353,000	369,000	1,018,000	1,494,000
Standard Oil Co. (Indiana)	11,000	17,000	293,000	278,000	403,000	409,000	383,000	357,000
Standard Oil Co. (Ohio)	—	—	—	—	612,000	694,000	—	—
Sun Co.	—	—	—	—	204,653	212,093	29,402	29,559
Tenneco	—	—	—	—	77,637	82,010	37,997	38,039
Texaco Inc.	—	—	—	—	346,000(y)	352,000(y)	1,140,000	1,543,000
Union Oil Co. of California	—	—	—	—	152,900	151,300	73,100	68,700

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*Includes natural gas liquids and liquid condensate.

(w) 1982 Cities Service data not available because it was not disclosed by then-owner Occidental Petroleum Corp. 1983 CITGO Petroleum Corp. data not available following acquisition by The Southland Corp.

(x) Excludes crude imported and processed for other companies.

Reports for 1983

Net Income		Net Income % of Gross Sales		Total Assets				Net Income as % of average stockholder equity	
% Change				(Add 000)		% Change			
1983 vs. 1982	1983 vs. 1978	1983	1982	1983	1982	1983 vs. 1982	1983 vs. 1978	1983	1982
21.7%	44.2%	2.4%	2.0%	6,217,098	6,145,303	1.2%	81.0%	8.1%	6.6%
1.6	70.8	2.6	2.4	1,399,268	1,166,022	20.0	42.5	9.4	9.3
-41.2	-60.4	1.2	1.8	4,108,000	4,210,000	-2.5	42.3	8.9	15.7
-7.6	92.4	6.2	6.3	23,282,000	21,633,000	7.6	94.0	14.9	18.1
-1.2	—	.79	1.8	1,390,419	139,676	895.5	—	—	—
-42.6	—	0.24	0.39	652,947	643,055	1.5	—	1.86	3.20
-130.0	-152.8	(3.1)	10.8	—	3,194,013	—	—	—	—
18.9	80.1	5.3	4.1	62,963,000	62,289,000	1.1	—	17.2	14.9
-28.5	50.8	4.3	5.8	10,385,050	9,924,490	-4.6	120.1	9.4	14.0
8.6	23.6	3.3	2.9	20,954,000	20,436,000	2.5	39.3	—	—
-43.5	.21	3.4	5.6	3,806,934	3,762,618	1.2	88.3	7.0	13.2
—	—	—	—	—	—	—	—	—	—
23.9	33.5	2.7	2.0	35,072,000	35,216,000	.41	55.1	10.8	8.5
-16.4	183.1	5.52	6.06	2,807,837	2,989,523	-6.1	85.1	14.0	18.8
11.6	1.4	4.7	4.0	13,094,000	12,097,000	8.2	88.8	11.7	11.1
1.7	100.7	7.9	7.7	22,169,000	21,376,000	3.7	120.7	14.3	15.5
15.5	43.8	5.6	3.9	24,010,000	23,490,000	2.2	43.2	—	—
2.3	73.5	6.8	6.5	25,805,000	24,289,000	6.2	82.9	15.7	16.5
-19.5	235.8	—	—	16,362,000	16,016,000	2.2	96.5	—	—
-15.6	24.0	2.9	3.3	12,466,000	11,850,000	5.2	126.7	8.7	10.5
-14.8	48.9	4.9	5.6	17,994,000	17,378,000	3.5	628.2	X	X
-3.7	44.6	3.1 (e)	2.7 (e)	27,199,000	27,114,000	.31	34.3	8.6	9.2
-22.2	63.0	5.9	7.3	9,228,000	8,511,300	8.4	—	12.6	18.2

(c) Includes excise taxes.

(d) Total sales & services.

(e) Net income as % of total sales & services.

Refinery Crude Runs b/d				Total domestic production as % of total domestic runs		Domestic refined petroleum product sales b/d	
Domestic		Foreign					
1983	1982	1983	1982	1983	1982	1983	1982
341,000	416,000	—	—	21.7%	18.4%	462,000	463,000
105,310	114,640	—	—	17.3	15.4	136,485	140,200
285,029	312,200	—	—	.94	.87	358,900	394,575
697,000	670,200	0	0	93.7	90.6	729,500	673,800
—	—	—	—	—	—	—	—
82,992	71,257	11,576	24 670	4.62	5.03	113,148	120,763
103,000	66,000	—	—	—	—	131,000	90,000
958,000	989,000	2,308,000	2,507,000	81.5	74.8	1,146,000	1,117,000
245,800	237,100	39,900	37,300	115.5	118.1	310,000	281,000
623,200	649,100	315,400	377,600	40.6	40.4	685,100	716,200
119,135	118,353	—	—	21.7	21.2	163,508	157,441
374,254	392,781	45,346	40,616	42.0	41.0	431,146	441,027
618,000	644,000	976,000	1,067,000	49.0	48.0	699,000	699,000
90,344	91,484	21,786	27,742	18.4	16.1	95,052	96,063
260,000	—	—	—	48.8	—	505,000	513,000
894,000	853,000	—	—	70.0	64.4	846,000	811,000
845,000	867,000	588,000	678,000	41.8	42.6	932,000	950,000
820,000	796,000	99,000	129,000	49.1	51.4	860,000	852,000
393,700	360,100	—	—	100	100	404,700	370,900
377,328	366,393	71,128	70,650	54.2	57.9	515,719	512,048
83,654	92,921	—	—	92.8	88.3	129,455	132,486
676,000(z)	694,000(z)	1,032,000	1,101,000	51.2	50.7	826,000	793,000
380,300	363,900	—	—	40.2	41.5	386,000	364,200

(y) Including interests in non-subsidiary companies.

(z) Including interests in non-subsidiary companies.

Source: NPN questionnaires and annual reports.

Quarterly and Full-Year Earnings—1983 vs. 1982

(Add 000,000)

	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Full-Year 1983	Full-Year 1982	% Change
Exxon Corp.	$1,060.0	$1,075.0	$1,225.0	$1,630.0	$4,990.0	$4,190.0	19.1%
Mobil Oil Corp.	250.0	402.0	404.0	445.0	1,501.0	1,213.0	23.7%
Texaco Inc.	319.0	327.0	331.0	256.0	1,233.0	1,281.0	(3.7)
Standard Oil Co. (Indiana)	399.0	426.0	584.0	459.0	1,868.0	1,826.0	2.3
Standard Oil Co. (California)	310.0	368.0	509.0	403.0	1,590.0	1,380.0	15.2
Atlantic Richfield Co.	310.4	393.4	405.1	419.0	1,547.0	1,676.1	7.6
Shell Oil Co.	246.0	390.0	449.0	549.0	1,633.0	1,605.0	1.7
Gulf Oil Corp. (a)	182.0	223.0	276.0	297.0	978.0	900.0	8.7
Tenneco Inc.	111.0	205.0	159.0	241.0	716.0	819.0	(12.6)
Standard Oil Co. (Ohio)	277.0	476.0	435.0	324.0	1,512.0	1,879.0	(19.5)
Phillips Petroleum Co.	129.0	169.0	176.0	247.0	721.0	646.0	11.6
Sun Co.	90.0	135.0	167.0	61.0	453.0	537.0	(15.6)
Getty Oil Co. (b)	157.8	(86.1)	183.7	238.9	494.3	691.6	(28.5)
Union Oil Co. of California	128.3	139.4	180.2	178.0	626.0	804.0	(22.1)
Amerada-Hess Corp.	5.0	68.2	75.1	57.0	205.3	168.7	21.7
Ashland, Inc.	29.1	(14.5)	37.1	51.1	102.8	180.9	(43.2)
Kerr-McGee Corp.	23.7	37.8	39.7	17.1	118.4	209.8	(43.5)
Diamond-Shamrock Corp.	4.6	29.5	39.7	(130.0)	(56.2)	185.1	—
Murphy Oil Corp.	27.9	40.4	39.8	24.0	132.0	158.0	(16.5)
American Petrofina Co.	0.3	8.6	23.0	55.3	23.4	14.8	58.1
Crown Central Petroleum Corp.	(10.5)	3.9	3.6	7.0	4.0	7.0	(42.6)
Southland Corp. (d)	7.7	34.0	60.1	36.8	138.6	101.2	40.0

(a) Gulf Oil was in the process of being purchased by Standard Oil Co. (California) in the Spring of 1984. (b) Getty Oil was in the process of being purchased by Texaco Inc. in the Spring of 1984. (c) Fiscal year ends 9/30 so these reflect four normal quarters. (d) Southland bought Cities Service from Occidental Petroleum early in 1983 and, although primarily a C-Store chain, also became the nation's leading independent gasoline marketer. Special note: Conoco, Inc. is now a division of Du Pont Co. and Marathon Petroleum is a division of U.S. Steel Corp. Quarterly and annual earnings are not published by either parent company.

How They Fared in 1982 vs. 1981

(Add 000,000)

	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Full-Year 1982	Full-Year 1981	% Change
Exxon Corp.	$839.0	$849.0	$1,017.0	$1,430.0	$4,190.0	$4,826.0	(13.3%)
Mobil Oil Corp.	244.0	287.0	284.0	398.0	1,213.0	2,433.0	(43.3)
Texaco Inc.	367.0	305.0	303.0	306.0	1,281.0	2,310.0	(44.5)
Standard Oil Co. (Indiana)	470.0	382.0	559.0	415.0	1,826.0	1,922.0	(5.0)
Standard Oil Co. (California)	230.0	263.0	459.0	425.0	1,380.0	2,380.0	(42.0)
Atlantic Richfield Co.	385.0	409.8	446.9	434.0	1,676.1	1,671.3	0.3
Shell Oil Co.	345.0	380.0	442.0	438.0	1,605.0	1,700.0	(5.3)
Gulf Oil Corp.	288.0	227.0	159.0	226.0	900.0	1,230.0	(26.8)
Tenneco, Inc.	129.0	204.0	198.0	288.0	819.0	813.0	0.7
Standard Oil Co. (Ohio)	455.0	473.0	487.0	464.0	1,879.0	1,946.9	(3.5)
Phillips Petroleum Co.	192.0	146.0	153.0	155.0	646.0	879.4	(26.6)
Sun Co.	124.0	110.0	152.0	151.0	537.0	1,080.0	(50.3)
Getty Oil Co.	179.0	159.6	182.7	172.7	691.6	856.9	(19.3)
Union Oil Co. of California	168.5	197.6	212.8	225.1	804.0	791.0	1.6
Amerada Hess Corp.	(16.2)	61.1	80.1	43.6	168.7	212.6	(20.6)
Ashland, Inc. (a)	47.6	(11.6)	69.1	75.8	180.9	90.0	101.0
Kerr-McGee Corp.	29.2	50.2	56.8	73.5	209.8	211.1	(0.6)
Diamond-Shamrock Corp.	64.6	31.9	42.3	46.2	185.1	121.3	52.6
Murphy Oil Corp.	33.8	41.7	43.9	39.0	158.0	163.0	(2.4)
American Petrofina Co.	15.9	10.9	12.7	54.4	14.8	74.1	(26.6)
Crown Central Petroleum Corp.	(1.0)	(2.9)	8.4	4.6	9.1	3.4	167.6
Southland Corp.	9.5	35.2	30.0	26.5	101.2	92.7	9.2

(a) Fiscal ends 9/30. Quarters adjusted to reflect normal year.

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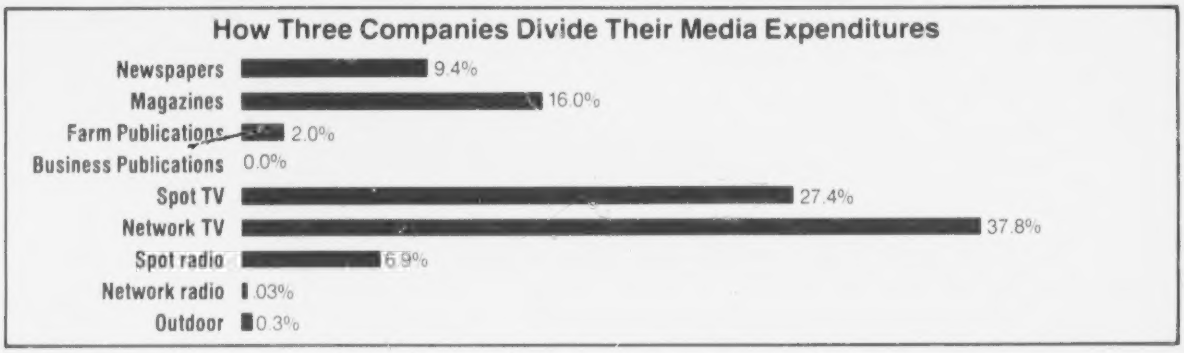
How Oil Spends Its Ad Money


How Three Companies Divide Their Media Expenditures

Source: Advertising Age and NPN estimates. Note table below for further detail and footnotes for special caveats.

How Oil Companies Split Their Budgets (a)

(Add 000)

	Mobil		Exxon		Shell	
	1982	1981	1981	1978	1978	1977
Newspapers	$ 8,046	$ 8,534	$1,529	$1,958	$ 751	$ 544
Gen. Magazines	6,181	2,740	6,755	5,179	4,706	4,722
Farm Publications	—	1,454	255	188	2,006	2,225
Business Publications	—	—	—	—	—	—
Spot TV	20,498	33,642	6,245	6,804	3,491	2,657
Network TV	9,808	11,340	24,215	12,668	7,659	10,906
Spot Radio	3,695	2,598	2,931	4,022	947	338
Network Radio	—	—	298	—	36	635
Outdoor	40	88	255	422	2	44
Total (b)	**$48,268**	**$60,395**	**$42,483**	**$31,261**	**$19,592**	**$22,224**

(a) Through the years, this table was based on data in Advertising Age's top 100 advertisers; however, neither Exxon or Shell have spent enough in recent years to be included in this group. These are the most recent numbers available. (b) Measured spending only: unmeasured total is much greater but strictly estimated.

Network TV Spending

Company	1982 Spending (Add 000)	1983 Spending (Add 000)	%Change
Phillips	$9,731	$11,225	+ 15%
Pennzoil	4,860	5,877	+ 21
Texaco	7,558	4,825	- 36
Quaker State	5,056	4,587	- 9
Burmah (Castrol)	—	3,819	+ Inf
Ashland	1,700	3,021	+ 78
Sun	6,461	1,933	- 70
Shell	9,511	1,697	- 82

Company	1982 Spending (Add 000)	1983 Spending (Add 000)	%Change
Witco (Kendall)	$ 609	$1,045	+ 72%
Union Oil of Calif	44	1,005	+ 2184
Gulf	414	736	+ 78
Exxon	4,213	727	- 83
Conoco	3,404	631	- 81
Getty	320	478	+ 49
Standard Oil (Calif.)	144	263	+ 83

Source: Television Bureau of Advertising from BAR, April 1984.

Spot TV Spending

Company	1982 Spending (Add 000)	1983 Spending (Add 000)	%Change
Exxon	$10,804	$15,371	+ 42%
Standard Oil (Ind.)	12,562	11,977	- 5
Shell	6,243	7,386	+ 18
Mobil	6,006	7,384	+ 23
Standard Oil (Calif.)	7,756	6,344	- 18
Union Oil of Calif.	6,816	6,072	- 11
Getty	4,621	5,259	+ 14
Gulf	6,756	3,766	- 44
Texaco	3,243	3,448	+ 6
Sun	3,500	3,300	- 6

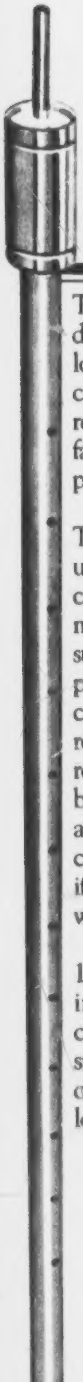
Company	1982 Spending (Add 000)	1983 Spending (Add 000)	%Change
Ashland	$2,796	$3,037	+ 9%
Pennzoil	2,623	2,849	+ 9
Quaker State	2,466	2,624	+ 6
Burmah Oil	3,048	2,241	- 26
Atlantic Richfield	4,414	1,965	- 55
Petrofina S.A.	985	1,008	+ 2
Phillips	986	802	- 19
Kerr-McGee	—	726	+ Inf
Standard Oil (Ohio)	2,092	663	- 68
Witco (Kendall)	697	487	- 30

Source: Television Bureau of Advertising from BAR, April 1984.

IMPORTANT INFORMATION
ABOUT UNDERGROUND TANK SECURITY

FACT:

TLS-150 CONTINUOUSLY MONITORS UNDERGROUND TANKS FOR FUEL INVENTORY STATUS… AND POSSIBLE LEAKS!

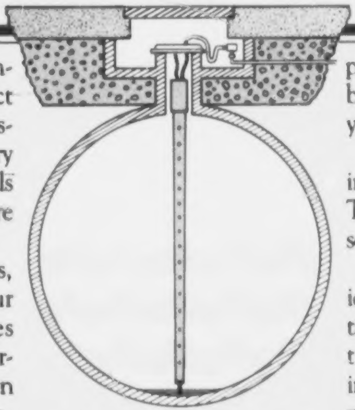


DIGITAL SENSING PROBE IS ALL-ELECTRONIC— NO MOVING PARTS.

TLS-150 tightens the controls on underground fuel inventory to detect losses from theft, leaks and meter miscalibration. Its on-demand inventory reports let you reconcile station totals far more accurately than ever before possible by sticking tanks!

During station operating hours, TLS continuously monitors your underground tanks and provides complete, accurate inventory information—in the office. Information such as fuel level and volume, fuel temperature, water level, station identification, and the date and time of each report. In addition, TLS automatically records deliveries to the tank, showing before and after inventories, temperature, time, date and net increase. Plus, a Sudden Loss Alarm contact can alert security or police, or trigger an on-site alarm if a theft or catastrophic leak occurs while the station is closed.

In its Leak Detect mode, TLS-150 continuously polls each tank during normal closed-time for small changes in volume—changes too small to detect through reconciliation or tank sticking! A pattern of steady losses over a period of time signals the possibility of a leak and lets you take action—before the damage becomes devastating to your business or the environment.



TLS-150 CONTINUOUSLY MONITORS TANK FOR FUEL LEVELS, TEMPERATURE AND WATER LEVEL— DAY AND NIGHT!

If fuel from another source does turn up in area water supplies or drainage systems, your TLS records offer evidence that your tanks are secure.

TLS-150's water detection capability identifies buildups due to condensation in the tank—or a *leak-in* in areas with a high water table. An optional telecommunications interface lets you poll stations from a central management location—especially important for unattended, card-authorized fueling sites. It also allows more effective planning of deliveries to multiple stations based on up-to-date inventory information.

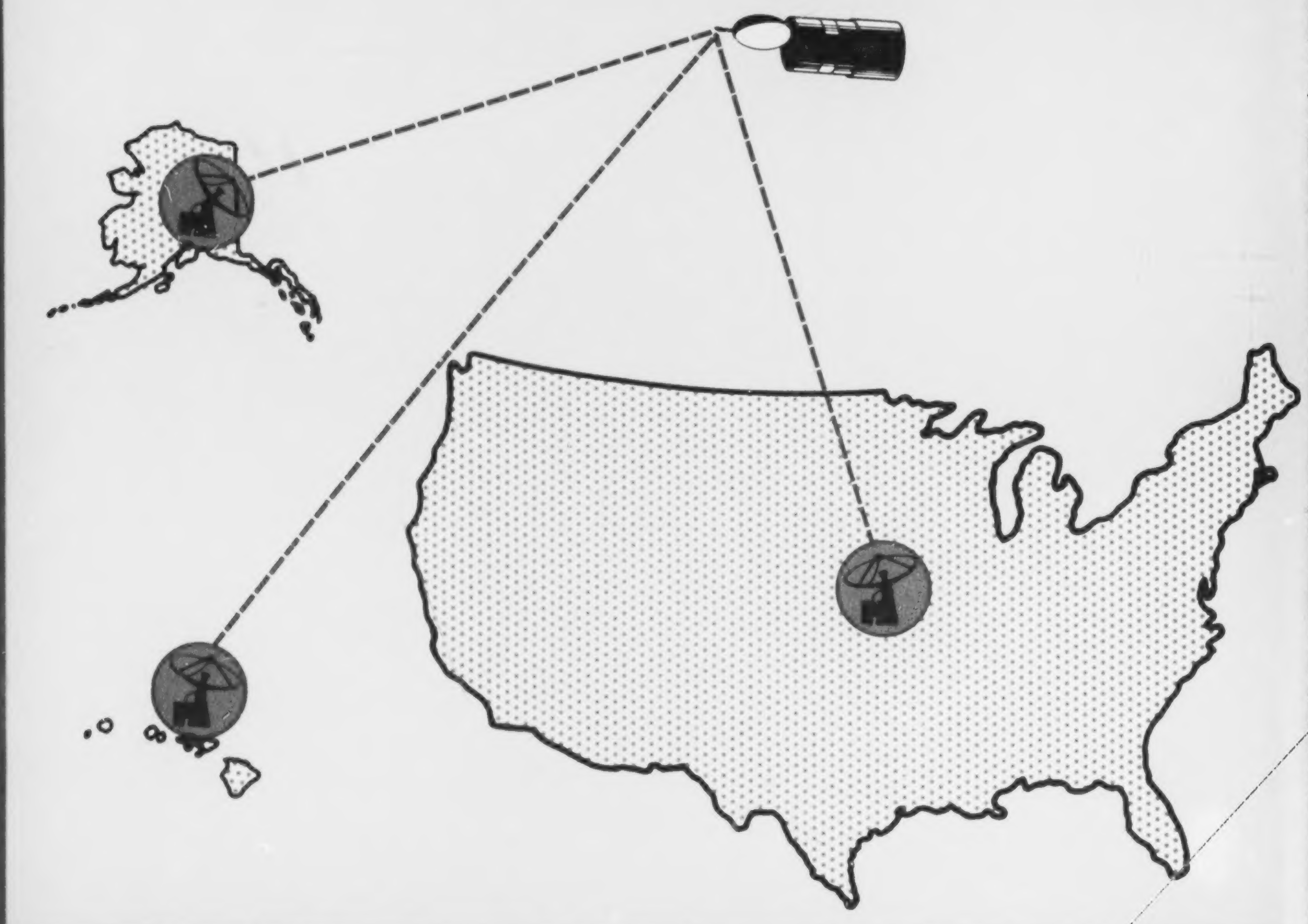
TLS-150 closes the loop in fuel inventory management. Its reports let you reconcile station totals to identify theft or delivery shortages, and make shift changes quickly. And since there is no need to stick tanks, your operator never has to leave the office or cash drawer unattended.

For complete information on TLS-150, contact your nearest Veeder-Root sales office. Veeder-Root Company, 70 Sargeant Street, Hartford, CT 06102, Tel. (203) 527-7201.

COMPUTERIZED INVENTORY MONITOR ANALYZES AND DISPLAYS FUEL INVENTORY INFORMATION; PRINTS REPORTS.

VEEDER-ROOT
A SUBSIDIARY OF
WESTERN PACIFIC INDUSTRIES

THE ELECTRONIC RETAIL SUPPORT SYSTEMS NETWORK

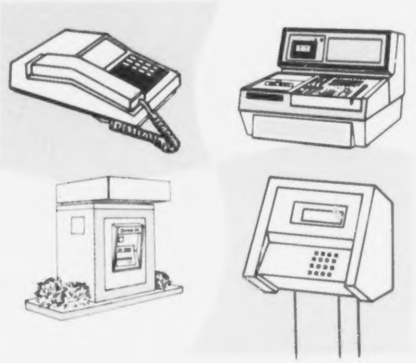


THE NETWORK FOR TODAY
AND FOR THE FUTURE

JCPenney is one of the largest retailers in the world.

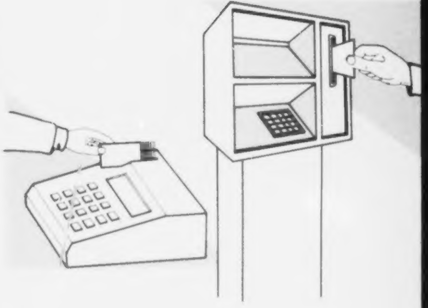
JCPenney is one of the largest retailers in the world. Our basic business is the same as yours — selling goods and services to the consumer. Over the past ten years JCPenney has developed a nationwide communications network with over 35,000 on-line terminals supporting our retail management systems.

JCPenney Systems Services, a wholly owned subsidiary, is a full service vendor offering your company access to the JCPenney network and retail systems expertise. This allows you to implement solutions to your business problems immediately — without the customary development time and costs.



The JCPenney network has the ability to interface with many types of equipment: dial-up terminals, electronic cash registers, island card readers — whatever type of equipment you select, JCPenney will accommodate your needs.

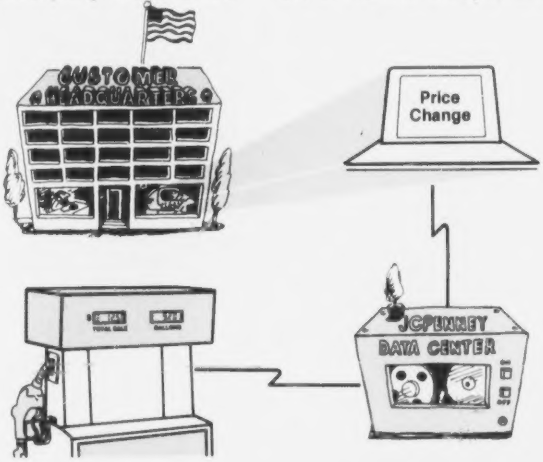
The JCPenney offering includes: authorization of proprietary credit cards, bank credit cards or debit cards; data collection; transaction logging; reconciliation; and delivery of data to the designated settlement system or data center. The offering is flexible and modular — allowing you to incorporate additional applications and additional locations if and when you need them. System redundancy, a complete help desk service and a sophisticatd technical staff provide the ability for JCPenney Systems Services to contractually guarantee our network's performance.



The basic service consists of a terminal installed at a customer location connected to a computer in a nearby JCPenney store via a leased line or dial-up link. Using a nearby JCPenney store as the network entry point makes the communication link the shortest and least expensive possible — providing the most cost effective electronic authorization and settlement services for you, the customer.

The benefits of the JCPenney approach to the Petroleum retailer are: reduction in float, reduction in bad debt, reduction in labor costs, improved customer service and convenience, increased market share, more marketing flexibility, improved intercompany communications — and it prepares you for the electronic payments system of the future.

Systems Services has positioned itself to be able to move rapidly into new technologies and new applications. We will always be ready with the right network and information processing systems to serve our petroleum customers' needs. Turning today's ideas into tomorrow's products is JCPenney Systems Services commitment to its present and future customers.



For further information contact:

JCPenney Systems Services, Inc.

1301 Avenue of the Americas • New York, NY 10019 • (212) 957-6211

Current Automotive Registrations

State	Automobiles			Trucks and Buses		All Motor Vehicles		Motorcycles	
	Registered 1982	Estimated 1983	% Chng.	Estimated 1983	% Chng.	Registered 1982	Estimated 1983	% Chng.	Estimated 1983
Alabama	2,194,794	2,197,000	0.1	881,000	4.3	3,039,460	3,078,000	1.3	69,000
Alaska	199,956	214,000	7.0	126,000	6.2	318,550	340,000	6.7	11,000
Arizona	1,882,896	1,648,000	4.1	660,000	4.3	2,215,549	2,308,000	4.2	106,000
Arkansas	968,330	955,000	−1.1	511,000	−1.0	1,481,366	1,466,000	−1.0	24,000
California	13,420,945	14,016,000	4.4	3,782,000	2.0	17,130,403	17,798,000	2.9	714,000
Colorado	1,843,399	1,847,000	0.2	669,000	1.6	2,501,727	2,516,000	0.6	118,000
Connecticut	2,099,377	2,119,000	0.9	161,000	1.5	2,257,975	2,280,000	1.0	77,000
Delaware	333,803	339,000	1.6	84,000	3.8	414,764	423,000	2.0	12,000
Dist. of Col.	212,762	211,000	−0.8	18,000	−3.3	231,368	229,000	−1.0	6,000
Florida	6,753,616	7,299,000	8.1	1,655,000	4.7	8,334,594	8,954,000	7.4	233,000
Georgia	2,995,234	3,031,000	1.2	941,000	2.2	3,915,819	3,972,000	1.4	117,000
Hawaii	528,125	532,000	0.7	61,000	4.8	586,306	593,000	1.1	7,000
Idaho	529,194	530,000	0.2	360,000	4.8	872,636	890,000	2.0	52,000
Illinois	5,855,187	5,840,000	−0.3	1,416,000	2.1	7,241,982	7,256,000	0.2	293,000
Indiana	2,874,145	2,873,000	−0.0	1,009,000	−0.0	3,883,617	3,882,000	−0.0	157,000
Iowa	1,667,984	1,664,000	−0.2	692,000	2.1	2,345,805	2,356,000	0.4	239,000
Kansas	1,392,762	1,398,000	0.4	699,000	4.6	2,061,174	2,097,000	1.7	130,000
Kentucky	1,809,711	1,817,000	0.4	816,000	1.3	2,615,341	2,633,000	0.7	64,000
Louisiana	2,010,151	2,036,000	1.3	782,000	−1.0	2,800,427	2,818,000	0.6	69,000
Maine	541,222	568,000	4.9	202,000	0.2	742,857	770,000	3.7	48,000
Maryland	2,421,184	2,453,000	1.3	480,000	1.6	2,893,425	2,933,000	1.4	75,000
Massachusetts	3,296,631	3,298,000	0.0	451,000	−0.4	3,749,568	3,749,000	−0.0	99,000
Michigan	5,005,544	5,007,000	0.0	1,331,000	6.9	6,250,289	6,338,000	1.4	223,000
Minnesota	2,338,304	2,347,000	0.4	980,000	4.2	3,278,425	3,327,000	1.5	173,000
Mississippi	1,214,950	1,230,000	1.2	380,000	0.5	1,593,021	1,610,000	1.1	29,000
Missouri	2,540,190	2,565,000	1.0	874,000	0.3	3,411,505	3,439,000	0.8	98,000
Montana	451,097	477,000	5.7	306,000	−0.3	757,924	783,000	3.3	47,000
Nebraska	804,626	814,000	1.2	415,000	1.1	1,214,991	1,229,000	1.2	45,000
Nevada	513..450	519,000	1.1	200,000	1.8	709,966	719,000	1.3	24,000
New Hampshire	660,588	666,000	0.8	115,000	1.8	773,564	781,000	1.0	59,000
New Jersey	4,389,581	4,402,000	0.3	538,000	1.9	4,917,379	4,940,000	0.5	104,000
New Mexico	779,944	806,000	3.3	428,000	3.6	1,193,161	1,234,000	3.4	63,000
New York	7,201,767	7,180,000	−0.3	1,097,000	6.2	8,234,857	8,277,000	0.5	192,000
North Carolina	3,445,754	3,468,000	0.6	1,120,000	−1.5	4,583,305	4,588,000	0.1	117,000
North Dakota	380,683	386,000	1.4	279,000	2.4	653,026	665,000	1.8	32,000
Ohio	6,324,670	6,305,000	−0.3	1,291,000	−1.5	7,635,860	7,596,000	−0.5	282,000
Oklahoma	1,787,616	1,811,000	1.3	1,029,000	3.7	2,779,800	2,840,000	2.2	134,000
Oregon	1,467,482	1,463,000	−0.3	622,000	2.4	2,074,696	2,085,000	0.5	89,000
Pennsylvania	5,617,934	5,613,000	−0.1	1,123,000	1.5	6,724,739	6,736,000	0.2	233,000
Rhode Island	507,284	505,000	−0.5	80,000	1.6	586,060	585,000	−0.2	29,000
South Carolina	1,518,689	1,594,000	5.0	451,000	−1.1	1,974,742	2,045,000	3.6	35,000
South Dakota	376,735	384,000	1.9	243,000	1.8	615,386	627,000	1.9	39,000
Tennessee	2,765,974	2,746,000	−0.7	607,000	1.3	3,381,216	3,353,000	−0.8	83,000
Texas	7,992,738	8,110,000	1.5	3,517,000	3.6	11,387,833	11,627,000	2.1	338,000
Utah	712,027	723,000	1.5	325,000	−0.4	1,038,411	1,048,000	0.9	66,000
Vermont	269,966	271,000	0.4	82,000	1.3	350,881	353,000	0.6	22,000
Virginia	3,153,409	3,144,000	−0.3	545,000	−1.3	3,705,347	3,689,000	−0.4	79,000
Washington	2,296,429	2,286,000	−0.5	931,000	−1.0	3,236,854	3,217,000	−0.6	136,000
West Virginia	792,707	802,000	1.2	340,000	−2.6	1,141,936	1,142,000	0.0	56,000
Wisconsin	2,560,470	2,570,000	0.4	633,000	5.2	3,162,337	3,203,000	1.3	210,000
Wyoming	298,847	303,000	1.4	219,000	4.9	507,601	522,000	2.8	22,000
Total	**123,897,863**	**125,382,000**	**1.4**	**36,557,000**	**2.1**	**159,509,075**	**101,939,000**	**1.5**	**5,779,000**

Source: Federal Highway Administration, Table 5582-2, October 1983.

Estimated Licensed Drivers, By Sex and States—1982 and 1983

(Add 000)

	1982 (Actual)				1983 (Estimated)		
State	Male	Female	Total	% Male Drivers	Male	Female	Total
Alabama	1,204	1,112	2,316	51.98	1,211	1,119	2,330
Alaska	183	137	320	57.15	196	147	343
Arizona	1,129	957	2,086	54.12	1,158	982	2,140
Arkansas	823	768	1,591	51.73	824	770	1,594
California	8,643	7,656	16,299	53.02	8,831	7,825	16,656
Colorado	1,138	1,044	2,182	52.15	1,141	1,048	2,189
Connecticut	1,158	1,077	2,235	51.83	1,167	1,085	2,252
Delaware	223	210	433	51.42	224	212	436
Dist. of Col.	201	184	385	52.10	199	184	383
Florida	4,142	3,837	7,979	51.92	4,285	3,970	8,255
Georgia	1,867	1,738	3,605	51.78	1,892	1,762	3,654
Hawaii	311	250	561	55.46	315	254	569
Idaho	348	316	664	52.43	351	320	671
Illinois	3,652	3,313	6,965	52.43	3,654	3,316	6,970
Indiana	1,650	1,695	3,345	49.33	1,652	1,697	3,349
Iowa	983	944	1,927	51.00	985	947	1,932
Kansas	862	832	1,694	50.92	872	842	1,714
Kentucky	1,146	995	2,141	53.52	1,155	1,004	2,159
Louisiana	1,356	1,184	2,540	53.39	1,380	1,206	2,586
Maine	394	364	758	52.00	408	377	785
Maryland	1,423	1,318	2,741	51.91	1,446	1,340	2,786
Massachusetts	1,887	1,755	3,642	51.81	1,894	1,763	3,657
Michigan	3,336	3,054	6,390	52.20	3,374	3,091	6,465
Minnesota	1,246	1,151	2,397	51.97	1,254	1,160	2,414
Mississippi	931	803	1,734	53.70	937	808	1,745
Missouri	1,702	1,596	3,298	51.60	1,721	1,615	3,336
Montana	270	222	492	54.82	271	225	496
Nebraska	561	524	1,085	51.71	565	529	1,094
Nevada	351	304	655	53.54	353	308	661
New Hampshire	352	325	677	52.03	356	330	686
New Jersey	2,821	2,516	5,337	52.86	2,846	2,539	5,385
New Mexico	490	453	943	52.00	501	464	965
New York	4,788	4,205	8,993	53.24	4,803	4,219	9,022
North Carolina	2,017	1,886	3,903	51.67	2,039	1,909	3,948
North Dakota	224	204	428	52.35	227	207	434
Ohio	3,990	3,678	7,668	52.03	3,990	3,680	7,670
Oklahoma	1,034	1,005	2,039	50.73	1,051	1,022	2,073
Oregon	1,001	892	1,893	52.88	1,004	896	1,900
Pennsylvania	3,878	3,474	7,352	52.75	3,880	3,476	7,356
Rhode Island	309	291	600	51.51	310	293	603
South Carolina	990	970	1,960	50.52	1,003	984	1,987
South Dakota	253	233	486	52.13	258	237	495
Tennessee	1,498	1,404	2,902	51.63	1,508	1,413	2,921
Texas	5,360	4,794	10,154	52.78	5,461	4,887	10,348
Utah	453	460	913	49.63	457	465	922
Vermont	187	168	355	52.79	187	169	356
Virginia	1,835	1,791	3,626	50.61	1,878	1,833	3,711
Washington	1,456	1,318	2,774	52.48	1,452	1,315	2,767
West Virginia	744	667	1,411	52.71	746	670	1,416
Wisconsin	1,576	1,460	3,036	51.91	1,585	1,469	3,054
Wyoming	219	179	398	55.08	219	179	398
Total	**78,596**	**71,714**	**150,310**	**52.29**	**79,476**	**72,562**	**152,038**
Percent Change From Prior Year	**0.9**	**3.7**	**2.2**	**—**	**1.1**	**1.2**	**1.1**

Source: Federal Highway Administration, Table SS82-5, October 1983

Automotive Trends

Fuel and Oil Consumption

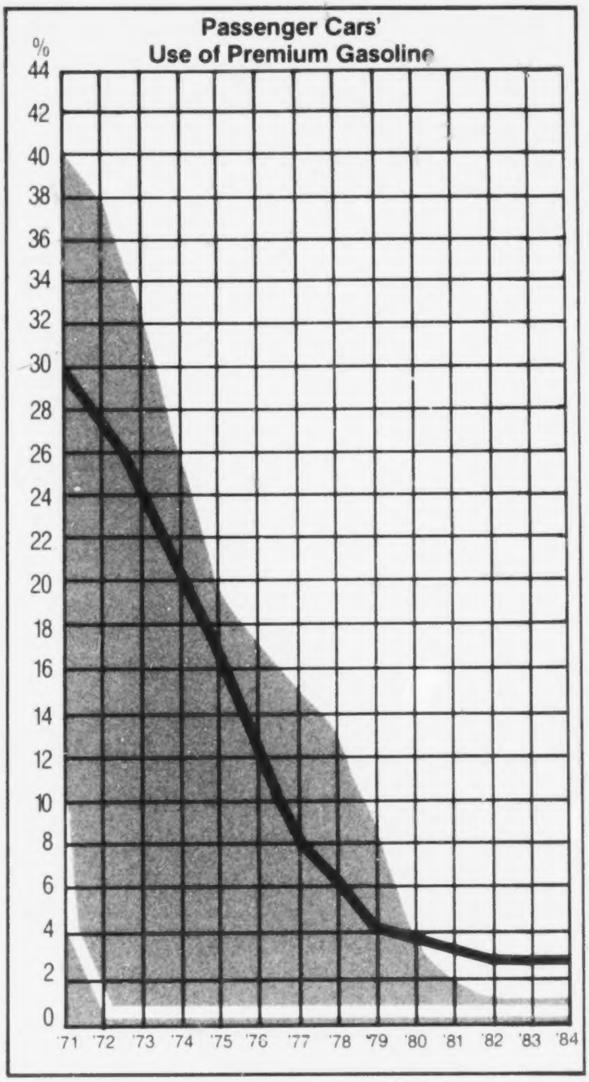
Year	Avg. annual miles per car (a)	Avg. gal. gasoline (a)	Avg. miles per gal. (a)	M/O ratio (b)	Avg. qts. motor oil
1983	**9,150**	**550**	**16.8**	**—**	**—**
1982	9,167	561	16.3	—	—
1981	9,002	579	15.5	.28	6.8
1980	9,135	603	15.2	.25	6.5
1979	9,245	664	14.3	.25	7.3
1978	10,046	715	14.1	.28	7.6
1977	9,839	706	13.9	.28	7.9
1976	9,763	711	13.7	.28	8.0
1975	9,364	712	13.5	.31	9.5
1974	9,448	704	13.4	.31	9.5
1973	9,992	763	13.1	.31	9.5
1972	10,184	755	13.5	.33	10.0
1971	10,121	746	13.6	.36	10.7
1970	9,978	735	13.6	.41	12.0
1965	9,387	667	14.1	.63	16.8

(a) 1965-1982 U.S. Department of Transportation; 1983 NPN estimate.
(b) Motor-oil ratio; the number of gal. of oil sold per 100 gal. of gasoline.

U.S. Passenger-Car Compression Ratios

Year	Weighted average (a)	Highest (b)	Lowest (b)
1984	**8.5**	**9.5**	**7.5**
1983	8.5	9.5	7.5
1982	8.5	9.5	7.5
1981	8.3	9.0	7.5
1980	8.3	9.0	7.5
1979	8.3	9.0	7.5
1978	8.2	9.0	7.5
1977	8.2	9.0	7.5
1976	8.2	9.0	7.6
1975	8.2	9.0	7.6
1974	8.2	9.0	7.6
1973	8.3	9.0	7.6
1972	8.4	9.0	8.0
1971	8.7	10.7	8.0
1970	9.4	11.0	8.3
1965	9.4	10.8	8.0

(a) Weighted average is based on production of automobiles of that model year. Production statistics have been used for all years except 1983 which are estimated.
(b) Highest and lowest compression ratios of standard (not optional) engines, excludes diesels.
Source: 1965-1974, Automotive-industry sources. 1975-84 NPN estimates.



■ Premium Recommended for cars on Road.
▨ Premium Gasoline Sales, U.S.
☐ Premium Recommended for Model Year.

Vehicle Ownership by Households And Licensed Drivers

Licensed Drivers	Motor Vehicle Ownership: One	Two	Three	Four +	Sub-Total	None	Distribution by Households (a)
One	65.6%	16.7%	12.4%	10.3%	35.8%	21.1%	33.6%
Two	29.8	73.1	47.5	36.1	50.0	3.1	42.6
Three	1.8	8.5	31.0	28.2	9.7	0.2	8.2
Four +	0.2	1.1	7.9	19.4	2.7	0.1	2.3
Five +	—	0.1	1.0	5.9	0.5	—	0.5
All Drivers	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Distribution (a) by Households	34.7%	34.3%	10.6%	5.0%	84.6%	15.4%	100.0%

(a) Based on 75.4-million households. Data compiled by Federal Highway Administration in the National Personal Transportation Study.
Source: FHA Highway Statistics 1979, Table NPTS-8, September 1980.

Passenger-Car Use of Premium

Year	Premium Recommended: Model Year	Premium Recommended: Cars on Road (a)	Premium Sales
1984	**0**	**3.0%**	**0.7%**
1983	0	3.0	0.8
1982	0	3.0	0.9
1981	0	3.0	1.4
1980	0	3.7	4.7
1979	0	4.5	8.3
1978	0	6.5	12.6
1977	0	8.9	14.8
1976	0	11.9	17.1
1975	0	15.9	19.0
1974	0	19.7	24.5
1972	0	27.1	38.1
1970	32	32.3	42.6

(a) Weighted average based on all car registrations.
Source: Premium sales 1964-1975, Ethyl Corp. 1976-1984 NPN estimates.

1982 Relationships by Population and Drivers

State	Resident Population (1,000)	Licensed Drivers per 1,000 Resident Population	Registered Motor Vehicles per 1,000 Resident Population	Gal. of Fuel per Vehicle	Miles per Gal.	Annual Miles per Vehicle	Vehicle Miles per Licensed Driver
Alabama	3,943	587	770	685	13.70	9,382	12,311
Alaska	438	732	727	735	15.81	11,543	11,543
Arizona	2,860	729	775	676	13.17	8,905	9,458
Arkansas	2,291	695	647	895	12.55	11,226	10,452
California	24,724	659	693	678	14.64	9,924	10,430
Colorado	3,045	717	821	653	14.56	9,508	10,899
Connecticut	3,153	709	716	609	14.64	8,919	9,010
Delaware	602	720	689	761	14.55	11,069	10,596
Dist. of Col.	631	610	366	805	18.16	14,609	8,777
Florida	10,416	766	800	638	14.95	9,538	9,964
Georgia	5,639	639	694	835	14.91	12,445	13,517
Hawaii	994	565	590	542	19.02	10,315	10,774
Idaho	965	687	904	556	16.19	9,004	11,843
Illinois	11,448	608	632	674	13.48	9,091	9,453
Indiana	5,471	611	710	755	13.37	10,094	11,719
Iowa	2,905	663	807	666	12.38	8,245	10,038
Kansas	2,408	703	856	676	12.66	8,567	10,425
Kentucky	3,667	584	713	748	13.10	9,799	11,970
Louisiana	4,362	582	642	856	11.22	9,606	10,592
Maine	1,133	668	656	751	13.72	10,297	10,101
Maryland	4,265	643	678	708	14.11	9,995	10,550
Massachusetts	5,781	630	649	630	15.51	9,779	10,070
Michigan	9,109	702	686	639	15.33	9,792	9,577
Minnesota	4,133	580	793	617	14.42	8,899	12,171
Mississippi	2,551	680	624	841	12.80	10,763	9,887
Missouri	4,951	666	689	808	12.70	10,260	10,615
Montana	801	614	946	588	12.89	8,799	13,558
Nebraska	1,586	684	766	732	12.86	9,412	10,545
Nevada	881	743	806	771	11.72	9,033	9,796
New Hampshire	951	712	813	535	16.83	9,012	10,290
New Jersey	7,438	718	661	700	15.05	10,534	9,705
New Mexico	1,359	694	878	728	13.67	9,932	12,567
New York	17,659	509	466	695	14.07	9,774	8,950
North Carolina	6,019	648	761	685	13.73	9,404	11,042
North Dakota	670	639	975	651	12.35	8,043	12,271
Ohio	10,791	711	708	672	13.98	9,397	9,356
Oklahoma	3,177	642	875	777	13.89	10,796	14,716
Oregon	2,649	715	783	674	13.87	9,343	10,237
Pennsylvania	11,865	620	567	729	14.54	10,605	9,701
Rhode Island	958	626	612	641	15.72	10,081	9,852
South Carolina	3,203	612	617	870	14.10	12,266	12,362
South Dakota	691	704	891	673	15.35	10,337	13,077
Tennessee	4,651	624	727	731	13.00	10,290	11,988
Texas	15,280	665	745	829	13.27	10,996	12,331
Utah	1,554	588	668	738	14.25	10,521	11,956
Vermont	516	688	680	698	16.31	11,300	11,246
Virginia	5,491	660	675	757	14.77	11,181	11,428
Washington	4,245	654	763	622	15.53	9,657	11,267
West Virginia	1,948	724	586	783	12.22	9,573	7,748
Wisconsin	4,765	637	864	691	14.97	10,370	10,800
Wyoming	502	792	1,011	847	12.28	10,404	13,276
Total	231,534	649	689	711	14.05	9,984	10,595

Source: Federal Highway Administration, Table 5582-16, October 1983.

Brand Names of Gasoline and Motor Oil

Gasoline	Motor Oil
Agway Petroleum Corp.	
Agway (r,ur)	Agway
Power Champ (r,ur,up)	
Ada Resources	
Phillips 66 (r,ur,up)	M&M (Phillips 66)
	Unique
	HDS
	HDS + 1
	Super HDS II
	Trop Artic
American Petrofina	
Fina Gasoline (r)	Fina Shield
Fina Unleaded (ur)	Fina HD Premium
Fina Premium (up)	Fina Ultra Supreme (10W40)
	Fina 2001 (5W30)
Amoco Oil Co.	
Amoco (r)	Amoco 100
Amoco Lead Free (ur)	Amoco 200
Amoco Premium Lead Free (up)	Amoco 300
	Amoco M-V
	Amoco LDO
	Amoco Ultimate
Arkla Chemical Corp.	
Arkla (r,ur,up)	Arkla Blue Chip
	Arkla Royal Blue
	Arkla Multi-Range 10W40
	Arkla Super Express 15W40
Armour Oil Co.	
Gas-N-Save	
Arco	
Union 76	
Ashland Petroleum Co.	
Ashland (r,p,ur,up)	
Atlantic Richfield Co.	
ARCO (r)	ARCO
ARCOClear (ur)	ARCO Fleet HD
ARCO Unleaded Supreme (up)	ARCO Fleet S3 Plus
	ARCO XHD
	ARCO Supreme
	ARCO G.T.
	ARCO Graphite
The Augsbury Organization	
Chevron (r,ur)	Chevron
Mobil (r,ur)	Mobil
Augsbury	Augsbury
Getty	
Automatic Comfort Corp.	
	Citgo Regular
	Citgo Premium
	Sun 10W40
	Citgo 10W40
	Havoline Supreme
Avalon Petroleum	
Avalon (r,ur,up, gasohol)	Citgo
	Kendall
	Chevron
Beacon Oil Co.	
Beacon (r,p,sp,ur,up,usp)	Sequoia
Apollo	
Ultra	
Best Oil Co.	
Gulf	
Mobil	
Amoco	
Brennan Petroleum	
Brenco (r,p,sp,ur,up,usp)	
Browning Oil Co.	
Shell	Shell
Rally	
Burmah Castrol	
	Castrol (various)
By-Lo Oil Co.	
By-Lo (r,ur,up,d)	Amoco
C.S.C. Oil Co.	
C.S.C. (r,p,sp,ur,up)	
Campbell Oil Co. (OH)	
Sunoco (r,p,ur,up)	Sunoco
Union (r,p,ur,up)	Shell
Shell (r,p,ur,up)	Union
	Citgo
	Quaker State
	Pennzoil
	Kendall
	Valvoline
Cannon Oil Corp.	
Cannon (r,ur,up,d)	
Cardon Oil Co.	
Cardon (r,ur,up,d)	Valvoline
	Pennzoil
	Mobil
	Chevron
	Shell
	Rev
Center Independent Oil Co.	
Ashland (r,ur,up)	Valvoline
BP	Quaker State
Mobil	Wolf's Head
Boron	Pennzoil
ARCO	
Gulf	
Certified Oil Co.	
Certified	Certified
Chapman Inc.	
Texaco (r,ur,up)	URSA
	Havoline
Chevron U.S.A.	
Chevron (r,ur,up, u-w ethanol)	Chevron Delo 100
	Chevron Delo 200
Calco (r,ur,up, u-w ethanol)	Chevron RPM Delo Motor Oil
	Chevron Special
	Chevron Delo 300
	Chevron Delo 400
	Chevron Custom
	Chevron Delo 300 15W40
Cibro Petroleum	
Cibro (r,u,up,d)	Cibro Prima I, Grade-10
	Cibro Prima I, Grade-20
	Cibro Prima I, Grade 10W40
CITGO Petroleum Corp.	
CITGO (r,ur,up,u-plus)	CITGO Non-Detergent
	CITGO C300 HD Detergent
	CITGO C500
	CITGO All Season 10W30
	CITGO All Season 10W40
Colonial Oil Industries	
Eagle (r)	
Colonial (ur,up)	
Comet Oil Co.	
Comet (r,ur,d)	Quaker State
Amoco (up)	
Conoco	
Conoco (r,ur,up)	Par
	Tracon
	Tracon Supreme
	Fleet
	Fleet Supreme
	Super
	New Generation All Season
Consumers Gasoline Stations	
Consumers (r,p,sp,o,ur,up,usp)	
Scot (r,p,sp,o,ur,up,usp)	
Cook & Cooley	
Texaco (r,p,ur)	Texaco
	Havoline
	Havoline Supreme
Crown Central Petroleum Corp.	
Crown	Crown
Crystal Flash	
Crystal Flash (r,gasohol)	Citgo
Crystal USA Oil	
Crystal (r,p,sp,ur,up,usp)	Saxon 30W
	Saxon 10W40
	Saxon A.T.F.
Curt's Oil Co.	
Curt's	Curt's
K.E. David Ltd.	
Citgo (r,ur)	ARCO
	Citgo
Davis Howland Oil Corp.	
Davis Howland	DSL Regular
	DSL Super Premium
	DSL Super Premium Delux
	DSL Universal Motor Oil
	DSL Universal Motor Oil Delux
	DSL XX HD Motor Oil
DeBlois Oil Co.	
Texaco (r,ur,up)	Texaco
Sunoco (r,ur,up)	Havoline
	Havoline Super Premium
Derby Refining Co.	
Derby (r)	Triumph
Star Kleen (ur)	Super Flex
Unleaded Plus (up)	Ultra-Life
	Premium E2
Desert Oil Co.	
Chevron (r,p,sp,ur,up,usp)	Gulf
Sinclair (r,p,sp,ur,up,sp)	Chevron

KEY

Gasoline

- **(r) Regular**
- **(u) Unleaded**
- **(p) Premium**
- **(sp) Super Premium**
- **(o) Other**
- **(d) Diesel**

Source: NPN Questionnaires

Gasoline	Motor Oil
Diamond Shamrock	
Diamond Shamrock Trailmaster (r)	Equa Flow
	Triple Action
Diamond Shamrock Cloud Master (ur)	Triple Action S-3
	LPG-NG
Diamond Shamrock Premium (up)	Genuine
	Liberty
Fill-em-Fast (r,p,ur,up)	
East Coast Oil Corp.	
East Coast	
Exxon Co., U.S.A.	
Exxon (r)	Oilex
Exxon Unleaded (ur)	Exxon Plus
Exxon Extra Unleaded (up)	Exxon Extra
	Uniflo
Alert (r,p,ur)	
FCX, Inc.	
Unico (r,ur,up)	Unico
Farmland Industries	
Co-op	Double Circle
	Dual Season
	Super TMS
Fisca Oil Co.	
Fisca (r,ur,up)	
Fletcher Oil Co.	
Veltex	
Flying J Inc.	
Flying J (r,ur)	
Gasco Gasoline	
Gasco (r,p,sp,ur)	Economy
	Gasco Premium
	Gasco All Season
Gastown, Div. of Embro Marketing Co.	
Gastown	Gastown
Gem Petroleum	
Citgo	Shop & Go
Gem	Citgo
	Quaker State
General Oil Co.	
General	
Giant Industries	
Giant (r,p,ur,up)	
Gresham Petroleum Co.	
Amoco (r,ur,up)	Amoco
Gulf Oil Co.	
Good Gulf (r)	Sapphire
Gulf Crest (ur)	Gulf Lube
Gulf Super Unleaded (up)	Gulf Pride
Harris Enterprises	
Awful Bros. (r,ur,p)	
Highland Petroleum Inc.	
7-Eleven	
Gas-Pit	
Barney Holland Oil Co.	
Texaco (r,ur,up)	Gulf
	Havoline
	Mobil
	Pennzoil
	Quaker State
	Exxon
Holland Oil Co. (OH)	
Holland (r,ur,up)	
Hop-In Food Stores	
Hop-In (r,ur,up)	
Hornet Oil Co.	
Hornet (r,ur,up)	

Gasoline	Motor Oil
Hudson Oil Co.	
Hudson (r,p,sp,ur,up,usp)	HUD
	Hudson
	Hudson Premium
Hughes Oil Co.	
Mobil (r,p,ur,up)	Mobil
Phillips (r,ur,up)	Phillips
Hull Oil Co.	
Hull (r,ur,up,d)	Phillips
J&L Oil Inc.	
J&L	J&L Special
	J&L Certified HD
	J&L HD 10W40
Kellett Oil Co.	
Kellett (r,ur,up)	
Kenan Oil Co.	
Circle K (r,ur,up)	
Kenaco (r,ur,up)	
Kerr-McGee Refining Corp.	
KM (r,ur,up)	Valulube
	Blue Mall "All Fleet"
	Heavy Duty
	Blue Velvet FEO
Kickapoo Oil Co.	
Kickapoo (r,p,sp,ur,up)	Kickapoo
	Pennzoil
Kimber-Allen Petroleum Corp.	
Amoco	Amoco
Citgo	Citgo
Getty	Getty
Kimbro Oil Co.	
Amoco (r,ur,up)	Amoco
Kittie Petroleum Inc.	
Texaco	Texaco
Phillips	Phillips
	Pennzoil
Kocolene Oil Corp.	
Kocolene (r,ur,up)	Kocolene Special
	Kocolene Regular
	Kocolene All Weather
Lido Oil Co. of New England	
Lido	Lido
MFA Oil Co.	
MFA (r,ur)	MFA Sho-Me
	MFA Heavy Duty
	MFA Super Heavy Duty
	MFA Duty Special II
Macmillan Ring-Free Oil Co.	
	Scot Lube
	Royal Scot
	Ring-Free
	Lone Ranger
Marathon Petroleum Co.	
MILE-maker (r,ur)	V.E.P. Heavy Duty Motor Oil
SUPER-M (up)	Multipower-3 Straight Weight
	Multipower-3 15W40 Motor Oil
	All-Season 10W30 Motor Oil
	Superior All-Season 10W40
	High Performance All-Season 20W50
	Ultra-D 5W40 Motor Oil
Marshall Oil Co.	
Starflite	

Gasoline	Motor Oil
Martin Oil Marketing	
Martin (r,p,o,ur,up,usp,uo)	Martin Oil
	Martin HD
	Martin 10 30
	Martin 10 40
Merchants Oil Inc.	
Phillips	Phillips
Merit Oil Corp.	
Merit (r,ur,up)	Merit Economy
	Merit 10W40
	Merit ATF
Mico Oil Co.	
Mico (r,ur,up)	
Mid-Missouri Oil Co.	
Shell	
Miller Oil Co. (OH)	
HyFlash (r,ur)	
Miller Oil Co. (VA)	
Amoco	
Exxon	
Phillips	
Mobil Oil Corp.	
Mobil (r,ur,up)	Mobil Regular
Reelo	Mobil Heavy Duty
Sello	Mobil Special
Hi-Val	Mobil Super
Big-Bi	Mobil 1 (synthetic)
Lo-Lo	
Murphy Oil USA Inc.	
Spur (r,ur,up)	
National Convenience Stores	
Gulf (r,p,sp,ur,up,usp)	Quaker State
Amoco (r,p,sp,ur,up,usp)	Pennzoil
	Texaco Havoline
National Oil & Gas Inc.	
Phillips (r,ur,up)	Marathon
Marathon (r,ur)	Shell
Citgo (up)	Phillips
	Mobil
	Kendall
Newell Oil Co.	
Gulf	Gulf
Noco Energy Corp.	
Noco (r,p,ur,up)	Noco
	Mobil
	Gulf
Osceola Refining Co.	
TA Energy (r,p,ur,up)	
Curtis Parker Oil Co.	
Amoco (r,ur,up)	Amolube
	Amoco 100
	Amoco 200
	Amoco 300
	Amoco M-V 10 30
	Amoco LDD 10 40
Peavey Oil Co.	
Texaco	Texaco
Pester Corp.	
Pester (r,p,sp,o)	
Phillips Fuel Co.	
Texaco	Texaco
Phillips Petroleum Co.	
Phillips 66 (r,ur,up,usp)	Unique
	MM Motor Oil
	Trop-Artic

Gasoline	Motor Oil
Piasa Motor Fuels	
Conoco (r,p,sp,ur,up,usp)	Conoco Shell Quaker State Valvoline Pennzoil
Pilot Oil Corp.	
Pilot (r,ur,up)	Pilot 2 Gallon Pilot Economy Pilot 10W40 Pilot A.T.F.
Port Oil	
Port (r,ur,up)	Palm Port
Power Test Corp.	
P.T. (r,ur,up)	Power Test Motor Oil Power Test Heavy Duty Power Test All Weather Power Test Dexron
Pride Oil Co.	
Tenneco (r,ur,up,d)	Kendall Pennzoil Quaker State Havoline
Quaker State Oil Refining Corp.	
Sterling (r,ur)	Quaker State Regular Motor Oil Quaker State HD Motor Oil Quaker State HDX Universal Fleet Motor Oil Quaker State Super Blend Motor Oil Quaker State QSX Performance Motor Oil Quaker State Deluxe Motor Oil Quaker State Sterling Motor Oil
Quality Oil Co.	
Shell (r,p,sp,ur,up,usp) Quality Plus (r,p,sp,ur,up,usp)	Shell
Quincy Oil	
Quincy (r,ur,up)	
Reinhardt Oil Corp.	
Sun (r) Sunlight (ur) Citgo (r,ur)	Sun Citgo
R.I. Marketing Inc.	
Rock Island	
River Oil Co.	
Phillips	Phillips
Rocket Oil Co.	
Rocket (r,ur,up)	
Ross Resources	
APCO (r,ur) U-Pump-It (r,ur)	
Santee Oil	
Shell (r,ur,up)	Shell X-100 Fire & Ice
Sears Oil Co.	
Sears	Tri-Pure Sears Sears Supreme
Shelby Petroleum Corp.	
Peer (r,p,sp,ur,up,usp) Sail (o,uo) Bonus (r,p,sp,ur,up,usp,o)	Sail Bonus Peer Premium Peer HD Peer Multi-Vis
Shell Oil Co.	
Shell (r,ur,up)	Shell Motor Oil Shell X-100 Shell Fire & Ice
Shotmeyer Oil Corp.	
U-Save Mogas (r,p,sp,ur,up,usp,d)	
The SICO Co.	
Amoco (r,ur,up) ARCO (r,ur,up)	Citgo Arco Texaco Valvoline Amoco Quaker State
Simon Oil Co.	
Sun Mobil	
Sing Oil Co.	
Sing	
Smith-Shafer Oil Co.	
S-S	Quaker State
The Somerset Refinery Inc.	
Somerset (r,p)	Gurley Valvoline Havoline Quaker State Pennzoil
Southland Oil Co.	
Southland	Southland
The Spencer Companies	
Amoco (r,ur,up) Citgo (r,ur,up)	Amoco Citgo Quaker State Havoline Castrol Oil Saxton
Standard Cycle & Auto Supply Co.	
Texaco	Texaco
Standard Oil Co. (Ohio)	
Octron (r) Cetron (ur) Wm. Penn (r,p,ur) Gas & Go (r,ur)	Premex 10W40 BP Extra Duty 10W30 Nitrex MPG5W40
Steuart Petroleum Co.	
Steuart (r,ur,up)	Kendall Pennzoil Sunoco
Sun Co.	
Sunoco (r,ur,up,usp,o)	Diamond Sun Lube Dynalube Special MPG Plus
Sunshine Jr. Stores	
Jr. (r,ur,up,usp)	
Tanner Oil Co.	
Rich (r,ur,up)	Valvoline
Target Enterprises (Calif.)	
Fast Save Texaco	Havoline
Taylor Oil Co.	
Etna (r,ur,up)	
Tenneco Oil Co.	
Tenneco (r,ur,up) Trust Direct	Shur Lube Tenneco Special Detergent Tenneco ATF Dexron II Tenneco ATF Ford Type F Tenneco Extra HD Tenneco Four Seasons
Tesoro Petroleum Corp.	
Tesoro (r,ur)	
Thornhill Oil Co.	
Amoco (r,ur,up)	Amolube Amoco Cash & Carry Amoco LDO Amoco Ultimate Quaker State Deluxe
Tooley Oil Co.	
Tooley's	
Total Petroleum	
Total APCO Vickers Best	APCO Defiance Total Dura Lube Vickers Big Value Total Super HD Vickers Golden Supreme Total Superlube Total 500 Vickers 10W40
Transit Oil Co.	
Transit	
Travelers Petroleum	
Self Way (r,ur,up) Texaco (r,ur,up)	
Union Oil Co. of California	
76 (r,p,ur,up)	Premium Motor Oil Super 10W40 Super 10W30 20W50 High Performance Guardol Motor Oil Guardol 15W40 Motor Oil United Motor Oil Heavy Duty Motor Oil EOK Motor Oil 15W40
United States Oil Co.	
Express (r,ur,up)	
Western Marketing Inc.	
Conoco (r,p,sp,o,ur,up,usp,uo)	Conoco Shell
Wickland Oil Co.	
Regal (r,ur,up)	Gold Shield
Willard Oil Co.	
Fast Phil's	
A.T. Williams Oil Co.	
Willo	Willo
J.H. Williams Oil Co.	
Union 76 (r,ur,up)	Union Custom Union Heavy Duty Union Guardol Union Premium Union Super Union High Performance Union Long Distance Purple
York Oil Co.	
Citgo Easy Go	Citgo
Young Oil Co. (AL)	
Young (r,ur)	
Zephyr	
Zephyr (r,p,ur,up)	Pride H.D. All-Temp

KEY

Gasoline
(r) Regular
(u) Unleaded
(p) Premium
(sp) Super Premium
(o) Other
(d) Diesel

Source: NPN Questionnaires

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4 **A complete product line,** so you can deal with one supplier, instead of a dozen.

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6 **An experienced and dedicated sales team** of lubrication professionals, all specialists in their own fields.

7 **An established distributor organization** with a proven record of success in selling CITGO products.

8 **Product development and technical services** to formulate the right lubricants for your needs.

9 **Our toll-free "800" number** puts the entire CITGO organization as close as the telephone on your desk.

10 **Custom packaging or private labeling** gives you the opportunity to market CITGO quality under your own brand name.

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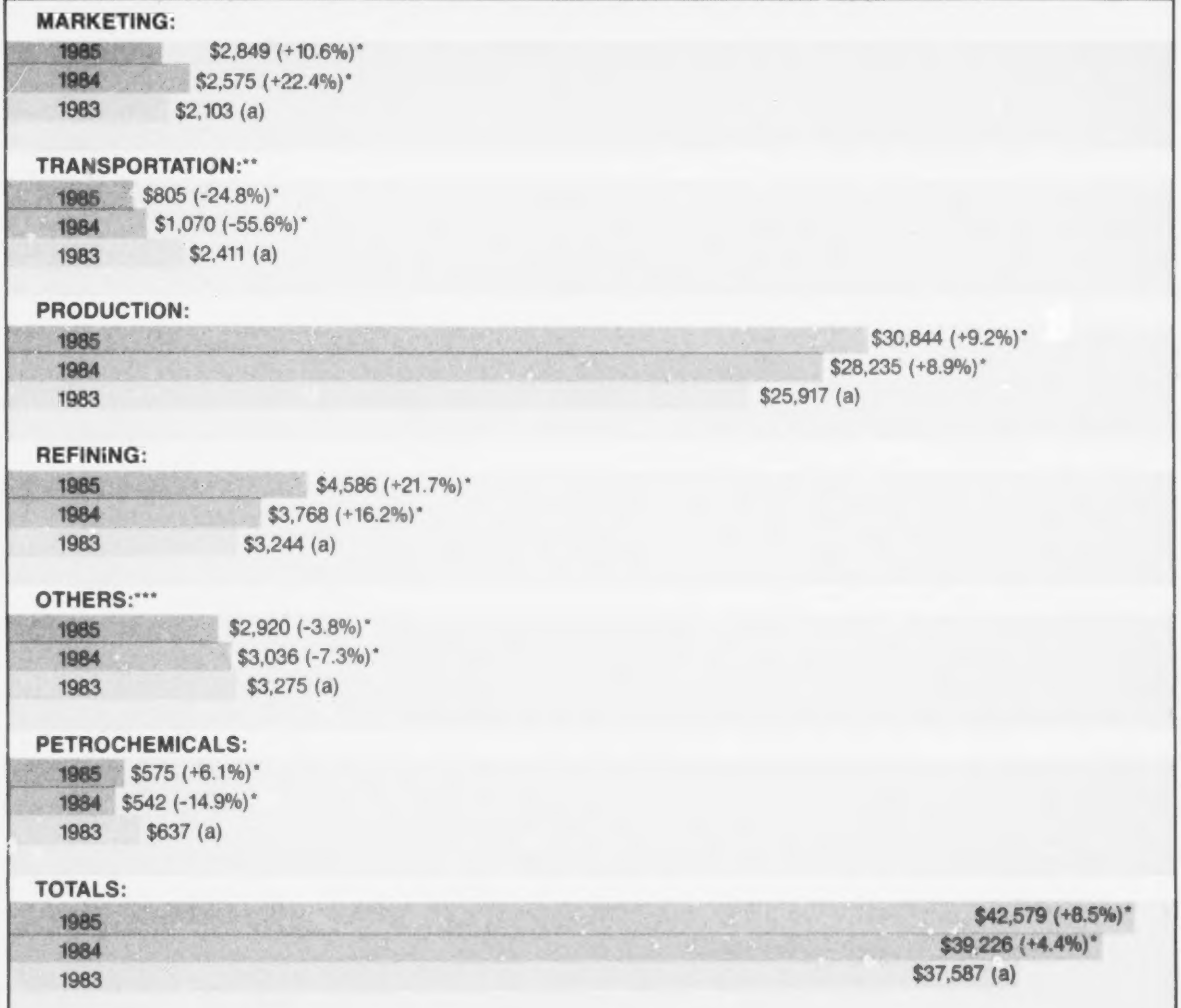

Capital Spending by Marketing Industry (Millions of Dollars)

*Figures in parentheses indicate percentage of change from previous year's total. **Includes only oil pipelines, not gas. ***Includes coal mining. (a) Comparisons with prior years cannot be made inasmuch as the projection bases from 1981 on were changed materially and cannot be related.

Source: McGraw-Hill Economics Department, Nov. 1983

Billions Targeted for Oil Marketing Expansion

Even as they retrench and regroup in the increasingly bitter battle for customers and markets, the nation's oil companies are pouring billions of dollars into new marketing facilities.

McGraw-Hill, Inc.'s annual capital investment forecast says the companies will spend at least $2.1-billion in 1983, $2.6-billion in 1984, and $2.8-billion in 1985 to modernize and expand their marketing facilities.

The three-year total of $7.5-billion is the most the industry has ever targeted for marketing alone in such a short period of time.

Add that to the $1.9-billion that was invested in 1982 and the $2.1-billion that was spent in 1981, and the five-year total approaches the $12-billion mark.

Most of the money is going into gasoline marketing, the industry's Cinderella product.

It's being used for real estate purchases, image enhancement programs, and for the modernization of gasoline stations or the construction of entirely new pumper-type locations to replace handfuls of smaller 30,000- to 50,000-gal. type outlets.

While real estate and other costs soar, suppliers, jobbers, and retailers must make the transition from orthodox operations to electronics with the anticipation that automated teller machines and electronic funds transfer will be coming on in breathtaking fashion over the next two or three years. Most majors already are experimenting with some form of electronic equipment.

The McGraw-Hill estimate is based on the majors, and accounts for about 75% of oil's capital spending, so it's possible to speculate that the remaining 25% could amount to as much as $2.5-billion in the 1983-85 period. If that is true, marketing's investments during that time span would be in the $10-billion range.

The entire petroleum industry is expected to invest $37.6-billion in 1983, $39.2-billion in 1984, and $42.6-billion in 1985. The industry's peak year of expenditures was 1981, when the investments exceeded $46.2-billion. They declined ever so slightly in 1982 in the face of sloppy markets and prices for gasoline and fuel oil—its principal products. Total investments plummeted to $37.6-billion in 1983—a one year drop of 18.5%. Production took the worst beating—a decline of almost $6-billion, as the world floated on a sea of excess oil.

Capital Spending in the Oil Industry: Almost $500-billion in 35 Years

	Planned 1985	Planned 1984	Estimated 1983	1982	1981
Marketing	$ 2,849	$ 2,575	$ 2,103	$ 1,940	$ 2,121
Refining	4,586	3,768	3,244	5,490	4,943
Transportation(a)	805	1,070	2,411	2,315	2,842
Production	30,844	28,235	25,917	31,035	31,233
Petrochemicals	575	542	637	1,060	1,243
Other(b)	2,920	3,036	3,275	4,273	3,853
Total Petroleum	**42,579**	**39,226**	**37,587**	**46,113**	**46,195**

	1980	1979	1978	1977	1976	1975	1974	1973	1972	1971
Production	$21,423	$17,039	$14,986	$12,593	$11,144	$ 8,925	$ 6,803	$4,307	$4,098	$3,356
Transportation(a)	2,001	1,473	989	1,191	1,832	1,681	907	708	532	572
Refining	3,378	3,070	2,071	2,025	2,531	2,275	1,716	1,013	1,062	1,232
Petrochemicals	1,053	946	1,239	1,245	1,092	847	729	339	300	361
Marketing	1,814	1,433	1,616	790	632	632	614	777	1,110	1,322
Other(b)	2,850	2,140	1,920	1,450	970	1,070	860	610	570	510
Total Petroleum	**32,519**	**26,101**	**22,821**	**19,294**	**18,201**	**15,430**	**11,629**	**7,754**	**7,672**	**7,353**

	1970	1969	1968	1967	1966	1965	1964	1963	1962	1961
Production	$ 3,541	$ 4,581	$ 3,980	$ 3,595	$ 3,788	$ 3,382	$ 3,584	$ 2,990	$ 3,382	$ 3,458
Transportation(a)	615	526	542	414	321	249	319	249	286	321
Refining	1,152	1,023	1,019	956	631	565	384	385	433	459
Petrochemicals	564	564	600	561	597	343	173	340	252	260
Marketing	1,392	1,141	1,097	1,065	926	747	655	560	538	533
Other(b)	510	416	408	453	310	365	281	168	154	132
Total Petroleum	**7,774**	**8,251**	**7,646**	**7,044**	**6,573**	**5,651**	**5,396**	**4,692**	**5,045**	**5,163**

	1960	1959	1958	1957	1956	1955	1954	1953	1952	1951
Production	$ 3,339	$ 3,474	$ 3,203	$ 3,603	$ 3,593	$ 3,500	$ 2,992	$ 2,779	$ 2,754	$ 2,388
Transportation(a)	306	276	317	423	261	249	350	450	400	300
Refining	455	402	657	877	694	590	686	661	446	339
Petrochemicals	150	115	NA	NA	NA	NA	NA	NA	NA	NA
Marketing	498	461	404	426	426	364	350	325	280	300
Other(b)	94	90	92	70	67	45	50	50	50	50
Total Petroleum	**4,482**	**4,818**	**4,673**	**5,399**	**5,041**	**4,748**	**4,428**	**4,265**	**3,930**	**3,377**

(a) Includes oil pipelines but not gas pipelines; (b) includes coal mining.

Source: McGraw-Hill Publications Co., Department of Economics. The figures in the tables represent capital spending of integrated petroleum companies in the mining, transportation, and retail trade sectors. The figures are not comparable with the petroleum figures in McGraw-Hill's regular capital spending report, in which the petroleum category includes spending of refiners and integrated companies only.

How Oil Companies Handle

MAJOR OIL COMPANIES	TOTAL BRANDED RETAIL OUTLETS*	TOTAL NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	BRANDED SERVICE STATIONS: Total true branded service stations	Supplied directly	Supplied through jobbers and commission agents	Lessee/dealer operated	Salary operated	Commission operated
Amoco Oil Co.	17,800	35	17,800	5,500	12,300	5,400	100	0
Atlantic Richfield	4,363(B)	24	4,363	2,978	1,385	(x)	(x)	(x)
Chevron USA	12,111	39	7,579	5,094	2,485	7,486	93	0
Exxon Co., USA	18,707	41	18,707	7,189	11,518	NA	NA	NA
Gulf Oil Co.	15,103	33	15,103	3,635	11,468	2,973	662	(QQ)
Mobil Oil Corp.	15,403(R)	43	(x)	(x)	(x)	(x)	(x)	(x)
Shell Oil Co.	12,147	40	5,124	5,124	0	4,894	230	0
Texaco (xxx)	18,692	46	17,756	4,400	13,042	13,042	3	304
SEMI-MAJOR OIL COMPANIES								
Ashland Petroleum Co.	187	7	187	81	106	187	0	0
Citgo Petroleum Co.	3,915	31	1,905	400	1,505	(x)	(x)	(x)
Conoco, Inc.	5,091	40	NA	NA	NA	NA	NA	NA
Crown Central Petroleum Co.	200 (PP)	(x)	(x)	All	(x)	(x)	(x)	(x)
Diamond Shamrock Corp.	1,993(I)	25	1,993	565	1,428	575	1,418	0
Getty Refining & Marketing Co. (xxx)	4,494	28	4,494	2,002	2,492	4,141	353	0
Kerr-McGee Refining Corp.	1,785	21	1,770	70	1,700	1,727	43	0
Marathon Oil Co.	2,210	5	2,192	684	1,508	503	0	0
Murphy Oil Co.	614	14	614	504	110	217	0	0
Phillips Petroleum Co.	11,827(W)	37	11,827	192	11,635	(x)	(x)	(x)
Standard Oil Co. (Ohio)	2,100	20	(x)	(x)	(x)	(x)	(x)	(x)
Sun Co.	6,808(JJ)	27	6,688	3,601	3,087	6,578	110	0
Tenneco Oil Co.	418(LL)	15	417	417	0	0	417	0
Union Oil Co. of Calif.	11,221	44	9,163	3,100	6,063	2,341	138	6,684
INDEPENDENT OIL COMPANIES AND SELECTED OIL JOBBERS								
Ada Resources	143	1	122	59	63	43	16	63
Agway Petroleum Corp.	187	9	—	46	—	29	14	3
American Oil & Supply	0	0	0	0	0	0	0	0
American Petrofina	4,037(A)	20	3,230	0	3,230	0	0	0
Arkla Chemical Corp.	4	3	1	4	0	3	1	0
Armour Oil Co.	85	5	85	85	0	0	43	42
Avalon Petroleum	1	1	1	1	0	0	1	0
The Augsbury Corp.	115	2	85	60	25	38	40	10
Automatic Comfort Corp.	52	1	14	14	0	4	0	0
Bagwell Oil Co.	16	2	4	4	0	4	0	0
Beacon Oil Co.	268	3	268	151	117	197	0	0
Best Oil Inc.	18	1	18	14	4	2	16	0
Brennan Petroleum Prod.	3	1	3	3	0	0	3	0
Browning Oil Co.	17	1	17	0	0	0	6	7
Bursaw Oil Corp.	40(C)	2	40	40	0	5	13	0
By-Lo Oil Co.	3	1	3	3	0	0	3	0
CSC Oil Co.	22	2	16	16	0	0	16	0
Campbell Oil Co.	75	1	75	0	0	75	0	0
Cannon Oil Corp.	17	3	17	17	0	0	16	1
Cardon Oil Co.	50	4	50	50	0	0	50	0
Cei Oil Products (D)	16	1	16	16	0	2	7	7
Center Indep. Oil Co.	15	1	15	15	0	0	15	0
Certified Oil Co.	200	3	200	200	0	0	100	100
Chapman Inc.	67	3	67	59	8	55	12	0
Chevron USA	12,111	39	7,579	5,094	2,485	7,486	93	0
Cibro Petroleum	104	1	85	15	70	0	0	0
Citgo Petroleum Corp.	3,915	31	1,905	400	1,505	(x)	(x)	(x)
Coln Oil Corp.	350	3	250	250	0	248	0	2
Colonial Oil Ind., Inc.	65(F)	3	65	65	0	0	65	0
Comet Oil Co.	4	2	4	4	0	0	4	0
Conna Corp.	267	9	0	0	0	0	0	0
Consumers Gasoline Stations	30	2	30	30	0	0	30	0
Consumers Petroleum (MI) (xxx)	20	1	(x)	(x)	(x)	(x)	(x)	(x)
Cook & Cooley, Inc.	75	1	75	0	0	0	0	0
Coral Ridge Corp.	0	0	0	0	0	0	0	0
Cory's Gasoline Stations	3	1	3	0	3	0	0	3
Crystal Flash	17	1	17	0	0	0	0	0
Crystal/USA Oil Co.	79(G)	5	79	79	0	59	20	0
Curt's Oil Co.	7	1	7	7	0	0	7	0
K. E. David, Ltd.	20	1	20	0	0	10	8	2
Davis-Howland Oil	1	1	1	1	0	0	0	0
DeBlois Oil Co.	50(H)	2	49	49	0	17	32	0
Derby Refining Co.	529	12	520	135	396	145	375	0
Desert Oil Co.	7	1	6	0	6	6	0	0
Dickey Inc.	6	1	6	6	0	0	6	0
Dixie Oil Co. (xxx)	97	3	97	(x)	(x)	97	(x)	(x)
East Coast Oil Corp.	32	1	32	32	0	0	32	0
Englefield Oil Co.	152	2	(x)	(x)	(x)	(x)	(x)	(x)
FCX, Inc.	98	2	0	0	0	0	0	0
Fairlie & Wilson Co.	0	0	0	0	0	0	0	0
Farmland Industries	1,100	16	770	0	1,100	0	0	0
Fireline Petroleum	509	11	509	509	0	0	509	0
Fisca Oil Co.	102	22	102	102	0	0	0	0
Fletcher Oil Co.	15(J)	3	15	15	0	2	5	8
Flying J. Inc.	59(K)	9	59	59	0	2	57	0
Franko Oil Co.	92	3	(x)	(x)	(x)	(x)	(x)	(x)
Gary Energy Corp. (xxx)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
Gas-N-Go	1	1	1	1	0	0	1	0

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*Total branded outlets, according to the U.S. Census Bureau definition, are establishments generating 50% or more of their income from the sale of petroleum products and services.

†Includes District of Columbia

(xxx) Did not respond—latest data available.

(x) Did not provide numbers.

(A) Includes American Petrofina Marketing Inc., Fina Serve Inc., Porto Fina Oil Co.

Product Distribution

			BRANDED JOBBERS				COMMISSION AGENTS			
				NUMBER SELLING . . .				NUMBER SELLING . . .		
Full service only	Self-service only	Self-service/ full service	Total	Gasoline only	Fuel oil only	Gasoline/ fuel oil	Total	Gasoline only	Fuel oil only	Gasoline/ fuel oil
1%	25%-30%	70%-75%	1,923	NA	NA	NA	0	NA	NA	NA
(x)	(x)	(x)	152	152	0	0	0	0	0	0
3,218	267	4,094	840(E)	0	89	501	40	0	0	40
NA	NA	NA	916	NA	0	NA	0	0	0	0
(x)	(x)	(x)	1,087	0	454	633	0	0	0	0
(x)	(x)	(x)	1,803	35	572	1,196	28	0	0	28
737	1,293	3,094	596	0	91	505	0	0	0	0
NA	NA	NA	1,176	NA	NA	NA	6	NA	NA	NA
113	1	73	32	6	3	23	160	0	0	160
(x)	(x)	(x)	250	0	0	250	0	0	0	0
NA	NA	NA	760	NA	NA	NA	0	0	0	0
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
100	1,643	250	166	166	0	0	0	0	0	0
—	—	—	582	0	0	582	—	—	—	—
50	204	1,516	428	62	26	340	0	0	0	0
830	73	1,289	86	0	6	80	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
(x)	(x)	(x)	1,751	0	0	1,751	2	0	0	2
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
(x)	(x)	(x)	(x)	(x)	(x)	(x)	0	0	0	0
1	416	0	0	0	0	0	0	0	0	0
1,923	2,271	4,969	405	1	0	404	158	0	0	158
91	16	15	19	19	0	0	2	2	0	0
0	44	2	28	4	2	22	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
969	808	1,453	440	374	0	66	0	0	0	0
2	2	0	0	0	0	0	0	0	0	0
0	85	0	0	0	0	0	43	43	0	0
1	0	0	0	0	0	0	0	0	0	0
25	50	10	0	0	0	0	3	0	0	3
14	0	0	(x)	(x)	(x)	(x)	3	3	0	0
4	0	0	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
10	219	39	23	23	0	0	0	0	0	0
2	16	0	0	0	0	0	0	0	0	0
0	3	0	0	0	0	0	0	0	0	0
4	2	11	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	3	0	0	0	0	0	0	0	0	0
0	10	6	0	0	0	0	0	0	0	0
NA	NA	NA	0	0	0	0	0	0	0	0
0	17	0	0	0	0	0	1	1	0	0
0	50	0	1	1	0	0	0	0	0	0
4	12	0	0	0	0	0	0	0	0	0
—	—	—	0	0	0	0	0	0	0	0
10	0	190	0	0	0	0	100	90	0	10
20	17	30	3	3	0	0	0	0	0	0
3,218	267	4,094	840(E)	0	89	501	40	0	0	40
60	0	25	18	0	0	18	0	0	0	0
(x)	(x)	(x)	250	0	0	250	0	0	0	0
100	2	148	0	0	0	0	0	0	0	0
7	4	54	0	0	0	0	0	0	0	0
1	1	2	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	267	267	0	0
9	20	1	0	0	0	0	0	0	0	0
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
0	50	25	75	45	0	30	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	3	0	0	0	0	0	1	0	0	1
1	12	4	0	0	0	0	2	0	0	2
0	79	0	0	0	0	0	0	0	0	0
0	7	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
35	12	2	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
95	290	135	89	0	0	89	0	0	0	0
0	0	6	2	0	0	2	0	0	0	0
3	1	2	6	4	0	2	0	0	0	0
(x)	50	40	90	50	(x)	40	(x)	(x)	(x)	(x)
0	27	5	0	0	0	0	0	0	0	0
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
0	0	0	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
0	0	0	0	0	0	0	0	0	0	0
300	100	700	1,100	0	0	1,100	0	0	0	0
36	404	0	0	0	0	0	0	0	0	0
0	102	0	0	0	0	0	0	0	0	0
10	5	0	0	0	0	0	0	0	0	0
0	57	2	0	0	0	0	0	0	0	0
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
0	1	0	0	0	0	0	0	0	0	0

(B) Includes Prestige Stations Inc.
(C) Includes Enon Enterprises Inc.
(D) Includes Gas-Up Inc.

(E) Includes 250 branded lube oil jobbers.
(F) Includes Interstate Stations Inc., Colonial Interstate Inc.
(G) Includes Crystal Petroleum Co., Inc.

BULK PLANTS				TERMINALS				
	COMPANY OPERATED				COMPANY OPERATED			
Total	Salary operated	Commission operated	Jobber operated bulk plants	Total	Salary operated	Commission operated	Jobber operated terminals	MAJOR OIL COMPANIES
0	0	0	2,241	84	84	0	NA	Amoco Oil Co.
0	0	0	0	43	43	0	(x)	Atlantic Richfield
714	0	44	670	126	100	1	25	Chevron USA
0	0	0	0	68	68	0	NA	Exxon Co. USA
2	1	0	NA	67	67	0	0	Gulf Oil Co.
231(S)	87	144	1,696	87	87	0	0	Mobil Oil Corp.
781	89	0	692	14(CC)	14	0	0	Shell Oil Co.
1,495	0	5	1,490	85	85	0	NA	Texaco (xxx)
								SEMI-MAJOR OIL COMPANIES
132	3	129	13	39	39	0	0	Ashland Petroleum Co.
0	0	0	0	60	32	0	28	Citgo Petroleum Co.
0	0	0	0	62	NA	NA	NA	Conoco, Inc.
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	Crown Central Petroleum Co.
0	0	0	0	13	13	0	0	Diamond Shamrock Corp.
—	—	—	—	33(RR)	30	3	—	Getty Refining & Marketing Co.
1	1	0	382	2	2	0	1	Kerr-McGee Refining Co.
253	1	0	1	50	50	0	0	Marathon Oil Co.
0	0	0	(x)	8	8	0	(x)	Murphy Oil Co.
6	4	2	(x)	31	31	(x)	4	Phillips Petroleum Co.
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	Standard Oil Co. (Ohio)
(x)	(x)	(x)	(x)	40	(x)	(x)	(x)	Sun Co.
39	21	18	0	11	11	0	0	Tenneco Oil Co.
192	39	153	441	56	54	2	1	Union Oil Co. of Calif.
								INDEPENDENT OIL COMPANIES AND SELECTED OIL JOBBERS
4	2	2	19	0	0	0	0	Ada Resources
113	113	0	28	11	11	0	0	Agway Petroleum Corp.
0	0	0	0	1	0	0	0	American Oil & Supply
0	0	0	352	9	9	0	0	American Petrofina
3	3	0	0	0	0	0	0	Arkla Chemical Corp.
0	0	0	0	0	0	0	0	Armour Oil Co.
0	0	0	0	0	0	0	0	Avalon Petroleum
8	6	2	0	5	5	0	0	The Augsbury Corp.
2	2	0	0	2	2	0	0	Automatic Comfort Corp.
0	0	0	0	0	0	0	0	Bagwell Oil Co.
23	0	C	23	9	0	0	9	Beacon Oil Co.
0	0	0	0	0	0	0	0	Best Oil Inc.
0	0	0	0	0	0	0	0	Brennan Petroleum Prod.
1	1	0	0	0	0	0	0	Browning Oil Co.
2	2	0	0	0	0	0	0	Bursaw Oil Co.
1	0	0	0	0	0	0	0	By-Lo Oil Co.
0	0	0	0	0	0	0	0	CSC Oil Co.
3	3	0	0	0	0	0	0	Campbell Oil Co.
1	1	0	0	0	0	0	0	Cannon Oil Corp.
1	1	0	1	0	0	0	0	Cardon Oil Co.
1	1	0	0	0	0	0	0	Cel Oil Products (D)
1	—	—	—	0	0	0	0	Center Indep. Oil Co.
0	0	0	0	0	0	0	0	Certified Oil Co.
4	2	0	2	0	0	0	0	Chapman, Inc.
714	0	44	670	126	100	1	25	Chevron, USA
0	0	0	0	4	0	0	0	Cibro Petroleum
0	0	0	0	60	32	0	28	Citgo Petroleum Corp.
2	2	0	0	0	0	0	0	Coen Oil Corp.
2	2	0	0	2	0	0	0	Colonial Oil Ind., Inc.
1	—	—	—	0	0	0	0	Comet Oil Co.
0	0	0	0	0	0	0	0	Conna Corp.
0	0	0	0	0	0	0	0	Consumers Gasoline Stations
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	Consumers Petroleum (MI) (xxx)
0	0	0	0	0	0	0	0	Cook & Cooley, Inc.
0	0	0	0	0	0	0	0	Coral Ridge Corp.
1	1	0	0	0	0	0	0	Cory's Gasoline Stations
4	2	2	0	0	0	0	0	Crystal Flash
0	0	0	0	0	0	0	0	Crystal/USA Oil Co.
0	0	0	0	0	0	0	0	Cort's Oil Co.
3	2	1	0	1	1	0	0	K. E. David, Ltd.
0	0	0	0	0	0	0	0	Davis-Howland Oil
3	3	0	(x)	(x)	(x)	(x)	(x)	DeBlois Oil Co.
0	0	0	0	0	0	0	0	Derby Refining Co.
2	0	0	2	0	0	0	0	Desert Oil Co.
3	3	0	0	0	0	0	0	Dickey Co.
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	Dixie Oil Co. (xxx)
0	0	0	0	0	0	0	0	East Coast Oil Corp.
9	9	0	0	0	0	0	0	Englefield Oil Co.
22	22	0	0	(x)	(x)	(x)	(x)	FCX, Inc.
2	0	0	0	2	0	0	0	Fairlie & Wilson Co.
1,250	0	0	1,250	0	0	0	0	Farmland Industries
0	0	0	0	1	1	0	0	Fireline Petroleum
0	0	0	0	0	0	0	0	Fisca Oil Co.
4	1	0	0	0	0	0	0	Fletcher Oil Co.
0	0	0	0	0	0	0	0	Flying J, Inc.
2	0	2	(x)	(x)	(x)	(x)	(x)	Franko Oil Co.
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	Gary Energy Corp. (xxx)
0	0	0	0	0	0	0	0	Gas-N-Go

(H). Includes Beacon Oil Co.

(I) Includes Sigmor Retail, Autotronic Systems.

(J) Includes Price-Less Gas, Inc.

How Oil Companies Handle

INDEPENDENT OIL COMPANIES AND SELECTED OIL JOBBERS	TOTAL BRANDED RETAIL OUTLETS*	TOTAL NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	BRANDED SERVICE STATIONS					
			Total true branded service stations	Supplied directly	Supplied through jobbers and commission agents	Lessee dealer operated	Salary operated	Commission operated
Gasco Gasoline	104	1	104	94	0	10	77	17
Gastown	196	1	196	196	0	6	190	0
Gate Petroleum Co.	80	8	80	80	0	—	—	—
Gem Petroleum	307	2	307	254	53	0	254	53
General Oil Co	52	2	52	NA	NA	0	42	10
Giant Industries Inc	12	2	12	6	6	0	12	0
Golden Gate Petroleum	0	0	0	0	0	0	0	0
Gresham Petroleum	12	1	3	3	0	3	0	0
Jack Griffith Petroleum Prods.	14	1	2	2	0	0	2	0
Growmark Inc. (xxx)	160	3	160	0	160	80	80	0
Gull Industries	110	2	0	0	0	0	0	0
Harrell Petroleum	25	1	12	0	25	5	—	—
Harris Enterprises	20	1	20	20	0	10	0	0
Highland Petroleum Inc.	0	0	0	0	0	0	0	0
Angus I. Hines Inc.	60	1	8	8	0	3	2	3
Hinkle Distributors	9	1	9	9	0	NA	NA	NA
Barney Holland Oil Co	68(M)	1	36	30	6	36	0	0
Holland Oil Co. (OH)	53	1	53	53	0	28	—	—
Hop-In Food Stores	112	2	NA	0	37	0	0	37
Hornet Oil Co.	37	6	37	37	0	—	—	—
Hub Langie Fuel Corp.	0	0	0	0	0	0	0	0
Hudson Oil Co. & Affiliated Cos. (L)	235	27	170	170	0	0	170	0
Hughes Oil Co.	110	1	50	50	0	50	0	0
Hull Oil Co	20	2	20	20	0	1	6	13
J & L Oil Inc.	65	3	62	62	0	6	56	0
J. S. & J. Service, Inc.	19	2	19	19	0	0	19	0
Johnson Products	40	5	40	19	21	0	40	0
Jones Oil Co	6	1	6	6	0	0	6	0
Kaibab Industries	30	1	0	0	0	0	0	0
Kellett Oil Co	3	1	3	3	0	0	0	3
Kenan Oil Co.	27	1	27	27	0	13	0	14
Kickapoo Oil Co.	55	1	55	55	0	0	55	0
Kimber-Allen Petroleum Corp.	175	1	175	175	0	163	12	0
Kimbro Oil Co	38	1	25	0	38	32	6	0
Kingston Oil Supply Corp	62	1(O)	62	52	10	56	4	2
Kirschner Bros. Oil Co	35	2	35	0	35	5	25	0
Kittie Petroleum Inc.	15	1	15	15	0	0	15	0
Kocolene Oil Corp.	78	8	78	68	10	0	78	0
Krause Gentle Oil Corp.	57	1	57	0	0	4	53	0
Kwik Shop Inc.	100	3	100	98	2	0	98	2
Land O' Lakes (IA) (xxx)	393	6	254	251	3	250	4	0
Landsea Oil Co	0	0	0	0	0	0	0	0
LePaul Oil Co.	14	4	14	14	0	5	—	—
Lido Co. of New England	85	3	55	85	0	25	20	40
MFA Oil Co.	200	2	200	200	0	195	5	0
Macmillan Ring-Free Oil	0	0	0	0	0	0	0	0
Major Brands Distrib.	0	0	0	0	0	0	0	0
Marathon Petroleum Co.	2,210	5	2,192	684	1,508	503	0	0
Marshall Oil Co.	50	1	50	0	0	10	8	32
Mauger & Co.	44	2	44	44	0	28	16	0
McCall Oil & Chemical Corp.	0	0	0	0	0	0	0	0
McDowell Oil Service	28	1	28	28	0	3	0	25
Merchants Oil	60	2	40	40	0	19	21	0
Mercury Oil Co	160	1	160	160	0	160	0	0
Merritt Truax	60	1	38	38	0	27	6	5
Mico Oil Co.	24	10	24	0	24	—	—	—
Mid Continent Systems	45	6	45	45	0	15	15	15
Mid-Missouri Oil Co.	6	1	1	1	0	(x)	(x)	(x)
Mid-States Petroleum	75	3	75	75	0	51	24	0
Miller Enterprises	39	1	0	0	0	0	0	0
Miller C. Holmes	(x)	9	(x)	(x)	(x)	(x)	(x)	(x)
Miller Oil Co. (OH)	4	1	4	4	0	3	1	0
Miller Oil Co. (VA)	52	1	52	52	0	31	15	6
Minuteman Service	356	3	356	356	0	0	356	0
Missouri Terminal Oil Co	16	1	NA	16	0	4	—	—
Monarch Oil & Supply Co	28	1	28	28	0	27	1	0
Morton Oil Marketing	92(T)	11	92	92	0	1	91	0
Munford, Inc.	471	14	0	0	0	0	0	0
Musket Corp. (xxx)	120	9	120	120	0	0	120	0
National Convenience Stores	60	5	0	0	0	0	0	0
National Oil & Gas	84(V)	2	66	0	66	32	3	31
Newell Oil Co.	12	1	12	0	12	9	1	2
Noco Energy Corp.	15	1	0	0	0	0	0	0
Oasis Petroleum Corp.	125	—	—	—	—	—	—	—
Osceola Refining Co.	10	1	10	10	0	0	10	0
Pacer Oil Co.	17	2	17	—	—	—	—	—
Pacific Northern Oil Corp.	44	1	40	44	0	18	11	13
Parker Oil Co.	250	2	8	8	0	8	0	0
Curtis Parker Oil Co.	45	1	15	13	2	15	0	0
Peavy Oil Co.	4	1	4	4	0	2	2	0
Pester Corp.	205	10	205	205	0	0	205	0
Petroleum Marketers Inc.	31	—	—	—	—	—	—	—
Petroleum Products Corp.	6	1	6	6	0	0	0	0

(K) Includes Vista.

(L) Includes Hudson Stations Inc., Hudson Van Oil of Kansas City Inc., Hudson Oil Co., Hudson Van Oil Co., Hudson Van Oil of Florida Inc., Hudson Petroleum, Hudson Co. of California Inc.

(M) Includes Decatour Oil Co.

(O) Includes Amos Post, Inc., Paramount Oil Corp.

Product Distribution (cont'd.)

			BRANDED JOBBERS				COMMISSION AGENTS			
				NUMBER SELLING . . .				NUMBER SELLING . . .		
Full service only	Self-service only	Self-service/ full service	Total	Gasoline only	Fuel oil only	Gasoline/ fuel oil	Total	Gasoline only	Fuel oil only	Gasoline fuel oil
(x)	94	10	0	0	0	0	0	0	0	0
6	190	0	0	0	0	0	0	0	0	0
—	—	80	—	—	—	—	—	—	—	—
0	307	0	28	28	0	0	0	0	0	0
0	52	0	0	0	0	0	0	0	0	0
0	12	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	3	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
0	2	0	0	0	0	0	0	0	0	0
130	0	30	112	0	0	112	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	25	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
3	3	2	0	0	0	0	0	0	0	0
0	0	9	0	0	0	0	0	0	0	0
23	1	12	1	0	0	1	0	0	0	0
NA	NA	NA	0	0	0	0	0	0	0	0
—	—	—	0	0	0	0	0	0	0	0
18	19	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	170	0	0	0	0	0	0	0	0	0
5	0	45	0	0	0	0	0	0	0	0
1	18	1	0	0	0	0	0	0	0	0
5	57	0	0	0	0	0	0	0	0	0
0	19	0	0	0	0	0	0	—	—	—
20	0	20	3	0	0	3	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	3	0	0	0	0	0	0	0	0
0	12	15	0	0	0	0	0	0	0	0
0	55	0	0	0	0	0	0	0	0	0
175	0	0	0	0	0	0	0	0	0	0
0	5	33	1	0	0	1	0	0	0	0
44	3	15	3	1	0	2	0	0	0	0
20	2	8	0	0	0	0	0	0	0	0
0	13	2	0	0	0	0	0	0	0	0
1	9	68	0	0	0	0	0	0	0	0
3	43	11	0	0	0	0	0	0	0	0
0	100	0	0	0	0	0	0	0	0	0
132	42	80	312	27	0	285	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	14	0	0	0	0	0	0	0	0
75	7	3	0	0	0	0	0	0	0	0
100	0	100	10	0	0	10	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
830	73	1,289	86	0	6	80	0	0	0	0
0	50	0	0	0	0	0	0	0	0	0
24	16	4	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
3	25	0	0	0	0	0	0	0	0	0
0	0	40	0	0	0	0	0	0	0	0
0	0	160	0	0	0	0	0	0	0	0
38	0	0	1	0	0	1	0	0	0	0
6	6	12	NA	—	—	—	0	0	0	0
0	15	30	0	0	0	0	15	15	0	0
(x)	(x)	(x)	0	0	0	0	0	0	0	0
25	30	20	2	0	0	2	3	0	0	3
0	0	0	0	0	0	0	0	0	0	0
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
4	0	0	0	0	0	0	0	0	0	0
12	6	34	0	0	0	0	0	0	0	0
100	156	0	0	0	0	0	0	0	0	0
11	5	0	0	0	0	0	0	0	0	0
26	1	1	0	0	0	0	0	0	0	0
1	91	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	120	0	0	0	0	0	0	—	—	—
0	0	0	0	0	0	0	0	0	0	0
22	0	44	1	0	0	1	17	0	0	17
1	5	6	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
—	—	—	—	—	—	—	—	—	—	—
0	10	0	0	0	0	0	0	0	0	0
0	17	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	4	4	0	0	0	0	0	0	0	0
0	0	0	1	0	0	1	2	0	0	2
4	0	0	4	0	0	4	0	0	0	0
0	199	6	0	0	0	0	0	0	0	0
—	—	—	—	—	—	—	—	—	—	—
0	0	6	0	0	0	0	0	0	0	0

(P) Includes North Iowa Oil Co.
(Q) Includes MFA Petroleum Co., Mid-South Div.
(R) Includes Sello, Reelo, Hi-Val, Big-Bi, Lo-Lo.

(S) Total wholesale distributing plants, including terminals.
(T) Includes Martin Oil of Indiana Inc., Martin 4-Min. Auto Salon, Inc.
(V) Includes National Oil Corp, National E & R. Inc.

BULK PLANTS				TERMINALS				
	COMPANY OPERATED				COMPANY OPERATED			
Total	Salary operated	Commission operated	Jobber operated bulk plants	Total	Salary operated	Commission operated	Jobber operated terminals	INDEPENDENT OIL COMPANIES AND SELECTED OIL JOBBERS
0	0	0	0	0	0	0	0	**Gasco Gasoline**
0	0	0	0	0	0	0	0	**Gastown**
0	0	0	0	0	0	0	0	**Gate Petroleum Co.**
8	0	0	8	0	0	0	0	Gem Petroleum
0	0	0	0	0	0	0	0	General Oil Co.
0	0	0	0	0	0	0	0	Giant Industries Inc.
2	2	0	0	1	1	0	0	**Golden Gate Petroleum**
1	(x)	(x)	(x)	0	0	0	0	**Gresham Petroleum**
0	0	0	0	0	0	0	0	**Jack Griffith Petroleum Prods.**
(x)	(x)	(x)	285	3	3	0	0	Growmark Inc.
0	0	0	0	0	0	0	0	Gull Industries
0	0	0	0	0	0	0	0	Harrell Petroleum
3	—	—	—	0	0	0	0	**Harris Enterprises**
0	0	0	0	0	0	0	0	**Highland Petroleum Inc.**
6	6	0	0	0	0	0	0	**Angus I. Hines Inc.**
1	NA	NA	NA	0	0	0	0	Hinkle Distributors
3	1	0	2	0	0	0	0	Barney Holland Oil Co.
0	0	0	0	0	0	0	0	Holland Oil Co. (OH)
0	0	0	0	0	0	0	0	**Hop-In Food Stores**
0	0	0	0	0	0	0	0	**Hornet Oil Co.**
0	0	0	0	0	0	0	0	**Hub Langie Fuel Corp.**
0	0	0	0	0	0	0	0	Hudson Oil Co. & Affiliated Oil Cos. (L)
2	2	0	0	0	0	0	0	Hughes Oil Co.
1	1	0	0	0	0	0	0	Hull Oil Co.
0	0	0	0	0	0	0	0	**J & L Oil Inc.**
0	—	—	—	0	—	—	—	**J. S. & J. Service Inc.**
5	0	0	5	0	0	0	0	**Johnson Products**
0	0	0	0	0	0	0	0	Jones Oil Co.
0	0	0	0	0	0	0	0	Kaibab Industries
1	1	0	0	0	0	0	0	Kellet Oil Co.
5	5	5	—	0	0	0	0	**Kenan Oil Co.**
0	0	0	0	0	0	0	0	**Kickapoo Oil Co.**
0	0	0	0	0	0	0	0	**Kimber-Allen Petroleum Corp.**
1	0	0	1	0	0	0	0	Kirnbro Oil Co.
0	0	0	0	0	0	0	0	Kingston Oil Supply Corp.
0	0	0	0	0	0	0	0	Kirschner Bros. Oil Co.
0	0	0	0	0	0	0	0	**Kittie Petroleum Inc.**
0	0	0	0	0	0	0	0	**Kocolene Oil Corp.**
1	1	0	0	0	0	0	0	**Krause Gentle Oil Corp.**
0	0	0	0	0	0	0	0	Kwik Shop Inc.
5	5	0	0	0	0	0	0	Land O' Lakes (IA) (xxx)
0	0	0	0	0	0	0	0	Landsea Oil Co.
0	0	0	0	0	0	0	0	**LePaul Oil Co.**
1	1	0	0	0	0	0	0	**Lido Co. of New England**
119	90	29	10	0	0	0	0	**MFA Oil Co.**
0	0	0	0	2	2	0	0	Macmillan Free-Ring Oil
0	0	0	0	0	0	0	0	Major Brands Distrib.
253	1	0	1	50	50	0	0	Marathon Petroleum Co.
0	0	0	0	0	0	0	0	**Marshall Oil Co.**
0	0	0	0	0	0	0	0	**Mauger & Co.**
4	(x)	(x)	(x)	4	4	0	0	**McCall Oil & Chemical Corp.**
1	(x)	(x)	(x)	0	0	0	0	McDowell Oil Service
1	1	0	0	0	0	0	0	Merchants Oil
2	NA	NA	NA	0	0	0	0	Mercury Oil Co.
6	(x)	(x)	(x)	0	0	0	0	**Merritt Truax**
0	0	0	0	0	0	0	0	**Mico Oil Co.**
4	4	0	0	4	4	0	0	**Mid Continent Systems**
1	1	0	0	0	0	0	0	Mid-Missourio Oil Co.
7	4	0	3	0	0	0	0	Mid-States Petroleum
0	0	0	0	0	0	0	0	Miller Enterprises
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	**Miller & Holmes**
0	0	0	0	0	0	0	0	**Miller Oil Co. (OH)**
3	(x)	(x)	(x)	1	(x)	(x)	(x)	**Miller Oil Co. (VA)**
0	0	0	0	0	0	0	0	Minuteman Service
0	0	0	0	1	—	—	—	Missouri Terminal Oil Co.
1	0	0	0	0	0	0	0	Monarch Oil & Supply Co.
0	0	0	0	3	3	0	0	**Morton Oil Marketing**
0	0	0	0	0	0	0	0	**Munford, Inc.**
0	—	—	0	0	—	—	0	**Musket Corp. (xxx)**
0	0	0	0	0	0	0	0	National Convenience Stores
11	0	11	11	0	0	0	0	National Oil & Gas
1	1	0	0	0	0	0	0	Newell Oil Co.
0	0	0	0	1	1	0	0	**Noco Energy Corp.**
—	—	—	—	—	—	—	—	**Oasis Petroleum Corp.**
0	0	0	0	0	0	0	0	**Osceola Refining Co.**
1	—	—	—	0	0	0	0	Pacer Oil Co.
0	0	0	0	0	0	0	0	Pacific Northern Oil Co.
7	7	0	0	1	1	0	0	Parker Oil Co.
3	1	2	0	0	0	0	0	**Curtis Parker Oil Co.**
1	1	0	0	0	0	0	0	**Peavy Oil Co.**
0	0	0	0	0	0	0	0	**Pester Corp.**
—	—	—	—	—	—	—	—	Petroleum Marketers Inc.
0	0	0	0	4	4	0	0	Petroleum Products Corp.

(W) Includes Aero Oil Co., Jobber bulk stations, jobber marinas.
(Y) Includes All Suns
(Z) Includes Corner Food Stores Inc., Paul Oil Co. Inc.

(AA) Includes Mission Trail Oil Co.
(BB) Includes Rebel Quik-Mart.
(DD) Includes Gas Pumpers of America Corp.

How Oil Companies Handle

INDEPENDENT OIL COMPANIES AND SELECTED OIL JOBBERS	TOTAL BRANDED RETAIL OUTLETS*	TOTAL NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	BRANDED SERVICE STATIONS					
			Total true branded service stations	Supplied directly	Supplied through jobbers and commission agents	Lessee/dealer operated	Salary operated	Commission operated
Petroleum Sales & Service	4	1	4	4	0	3	1	0
Phillips Fuel Co.	80	1	80	80	0	79	1	0
Piasa Motor Fuels Inc.	25	2	24	24	0	16	8	0
Pilot Oil Corp.	101	11	101	101	0	0	101	0
Port Oil Co.	58	2	58	58	0	0	58	0
Power Test Corp.	475(Y)	5	475	475	0	350	125	0
Pride Oil Co. (TN)	12	1	12	12	0	0	12	0
Pride Oil Co. (MS)	25	2	25	25	0	3	1	21
Private Brand Services	1	1	1	1	0	0	1	0
W. H. Pugh Oil Co.	15	1	15	15	0	9	6	0
Pyramid Oil Co.	45	1	45	45	0	45	0	0
Quaker State Oil Ref. Corp.	202	4	150	7	143	0	0	0
Quality Oil Co.	110	2	71	71	0	71	0	0
Quincy Oil	5	1	5	3	2	—	—	—
Quartrup Petroleum Co.	7	1	4	0	7	4	3	0
Reinaur Petroleum Co.	43	1	43	43	0	43	0	0
Reinhardt Oil Corp.	35(Z)	1	10	10	0	7	0	3
Research Fuels Inc.	2	1	0	0	0	0	0	0
R. I. Marketing, Inc. (TT)	202	NA	NA	0	202	—	—	—
River Oil Co.	23	1	20	20	0	20	0	0
Robinson Oil Co.	22(AA)	1	22	22	0	0	22	0
Rocket Oil Co.	0	0	0	0	0	0	0	0
Ross Resources Inc.	20	2	20	19	1	8	12	0
Sahara Oil Co.	23(BB)	1	23	23	0	0	23	0
Santee Oil Co.	58	1	12	12	0	8	4	0
Schaeffer Oil	26	5	0	0	0	0	0	0
Sears Oil Co.	12	1	12	12	0	11	1	0
Self-Service Oil Co.	18	4	18	18	0	0	18	0
Shelby Petroleum Corp.	20	2	20	20	0	0	20	0
Shell Oil Co.	12,147	40	5,124	5,124	0	4,894	230	0
Shotmeyer Bros. Petroleum	70	1	70	70	0	70	0	0
Shotmeyer Oil Corp.	36(DD)	3	0	0	0	0	0	0
SICO Co.	145	2	64	64	0	46	18	0
Simon Oil Co.	125	1	110	110	0	117	8	0
Sing Oil Co.	75	4	25	25	0	25	50	0
Smith-Shafer Oil Co. (EE)	8	2	8	8	0	0	7	1
Somerset Refinery	30	1	30	30	0	6	8	16
Southern Counties Oil Co.	4	1	4	4	0	0	4	0
Southern Union Ref. Co.	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
Southland Oil Co.	50	1	50	50	0	30	0	20
Speedway Petroleum Co.	18	2	18	—	—	—	—	—
The Spencer Companies	103(FF)	1	21	0	21	11	10	0
M. Spiegel & Sons Oil Corp.	34(HH)	1	34	34	0	34	0	0
Standard Cycle & Auto Supply Co. (SCASCO)	40	1	40	40	0	31	6	3
Star Oil Co.	58	1	58	—	—	58	0	0
Star Service & Petroleum	156(II)	15	156	156	0	0	0	0
Steuart Petroleum Co. (xxx)	6	1	6	6	0	0	0	0
J. D. Streett & Co.	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
Stormy Oil Co.	7	1	7	7	0	7	0	0
Sunshine Jr. Stores	322	5	0	0	0	0	0	0
Tanner Oil	97(KK)	3	86	86	0	1	84	1
Target Enterprises (CA)	100	1	100	0	100	0	100	0
A. Tarricone (ATI)	150	3	NA	—	—	—	—	—
Taylor Oil Co.	57	2	57	57	0	0	0	57
Tesoro Petroleum	91	2	91	21	70	70	21	0
Thornhill Oil Co.	23	1	23	0	23	21	4	0
Time Oil Co.	240	5	NA	240	0	NA	NA	NA
Tommy Oil Co.	27	11	27	27	0	0	27	0
Tooley Oil Co.	10	2	10	10	0	0	10	0
Tosco Corp.	0	0	0	0	0	0	0	0
Total Petroleum	1,863(MM)	22	1,863	483	1,380	1,380	483	0
Town Pump	61	1	61	61	0	0	61	0
Transit Oil Co.	15	2	15	15	0	NA	NA	NA
Travelers Petroleum	83	3	9	9	0	0	9	0
Trenton Oil Co.	50	1	50	50	0	50	0	0
Triton Inc.	42	4	42	42	0	1	40	1
Truax Corp.	65	2	65	65	0	10	50	5
Ultramar Petroleum	2	1	2	2	0	0	2	0
United States Oil Co.	5	1	5	5	0	1	—	—
Wake Up Oil Co.	43	1	43	43	0	1	42	0
Warelubco Inc.	92	(x)	NA	92	0	—	—	—
Webster Companies	18	1	18	18	0	10	8	0
West Penn Oil Co.	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
Western Marketing	25	1	25	25	0	2	23	0
Wickland Oil Co.	85	3	85	85	0	85	0	0
Willard Oil Co.	25	1	25	25	0	0	—	—
A. T. Williams Oil	67	2	67	(x)	(x)	(x)	(x)	(x)
J. H. Williams Oil	87(NN)	1	87	83	4	83	3	1
York Oil Co.	14	1(OO)	0	0	0	0	0	0
Young Oil	11	1	11	11	0	9	2	0
Zarda Bros.	19	2	8	14	—	—	—	—
Zephyr Inc.	50	2	40	40	0	0	40	0

(EE) Unbranded.
(FF) Includes Watkins Oil Co., Fuller Oil Co., Hicks Oil Co.
(GG) Includes sub-jobbers.

(HH) SOS Oil Corp.
(II) Includes Pep Gas & Wash.
(JJ) Includes Sun Refining & Marketing Co., Herr Gas & Oil Co., Mid-State Oil Co.,

Product Distribution (cont'd.)

			BRANDED JOBBERS				COMMISSION AGENTS			
				NUMBER SELLING . . .				NUMBER SELLING . . .		
Full service only	Self-service only	Self-service/ full service	Total	Gasoline only	Fuel oil only	Gasoline/ fuel oil	Total	Gasoline only	Fuel oil only	Gasoline/ fuel oil
0	0	4	0	0	0	0	6	6	0	0
80	0	0	0	0	0	0	0	0	0	0
4	3	17	0	0	0	0	0	0	0	0
1	97	3	0	0	0	0	0	0	0	0
4	49	5	0	0	0	0	0	0	0	0
420	25	30	0	0	0	0	0	0	0	0
0	6	6	0	0	0	0	0	0	0	0
0	23	2	0	0	0	0	0	0	0	0
0	1	0	0	0	0	0	0	0	0	0
5	10	0	0	0	0	0	0	0	0	0
45	0	0	0	0	0	.0	0	0	0	0
140	10	0	55	0	0	55	0	0	0	0
2	0	69	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
4	3	0	1	1	0	0	0	0	0	0
43	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
NA	NA	NA	NA	—	—	—	NA	—	—	—
0	0	20	0	0	0	0	0	0	0	0
0	22	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	17	3	0	0	0	0	0	0	0	0
0	23	0	0	0	0	0	2	0	0	2
2	2	8	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
11	1	0	0	0	0	0	0	0	0	0
0	18	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0	0
737	1,293	3,094	596	0	91	505	0	0	0	0
70	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
50	12	2	0	0	0	0	0	0	0	0
81	14	30	0	0	0	0	0	0	0	0
20	35	20	0	0	0	0	0	0	0	0
0	6	2	0	0	0	0	0	0	0	0
0	0	30	30	17	0	13	0	0	0	0
0	4	0	1	0	0	1	0	0	0	0
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
0	0	50	0	0	0	0	0	0	0	0
—	—	—	—	—	—	—	—	—	—	—
1	15	5	4(GG)	0	0	4	0	0	0	0
0	0	34	0	0	0	0	0	0	0	0
25	6	10	0	0	0	0	0	0	0	0
—	—	—	0	0	0	0	0	0	0	0
0	0	156	0	0	0	0	0	0	0	0
1	143	1	73	73	0	0	0	0	0	0
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
1	6	0	0	0	0	0	0	0	0	0
0	0	0	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
0	57	0	0	0	0	0	0	0	0	0
0	100	0	0	0	0	0	(x)	(x)	(x)	(x)
—	—	—	—	—	—	—	—	—	—	—
0	57	0	0	0	0	0	0	0	0	0
0	17	74	11	11	0	0	0	0	0	0
6	5	12	0	0	0	0	0	0	0	0
—	—	—	—	—	—	—	NA	NA	NA	NA
9	3	15	0	0	0	0	0	0	0	0
0	10	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0
0	683	1,180	1,380	0	0	1,380	0	0	0	0
0	61	0	0	0	0	0	0	0	0	0
1	12	2	0	0	0	0	0	0	0	0
0	9	0	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
50	0	0	0	0	0	0	0	0	0	0
1	40	1	0	0	0	0	0	0	0	0
65	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
0	0	5	0	0	0	0	0	0	0	0
7	0	36	0	0	0	0	0	0	0	0
0	5	87	0	0	0	0	0	0	0	0
6	8	1	0	0	0	0	0	0	0	0
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
0	23	2	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
1	84	0	0	0	0	0	0	0	0	0
12	8	5	0	0	0	0	0	0	0	0
0	67	0	0	0	0	0	0	0	0	0
35	3	49	0	0	0	0	1	0	0	1
0	0	0	0	0	0	0	4	4	0	0
6	3	2	0	0	0	0	0	0	0	0
9	10	0	0	0	0	0	0	0	0	0
10	30	0	5	0	0	5	3	(x)	(x)	(x)

Stop-N-Go Foods, Inc., Montour Auto Service Co., Inc., Mascot Petroleum Co.
(KK) Includes Rich of Ohio, Rich of West Virginia, Tanco Inc., and Rich Oil Corp.
(LL) Includes Tenneco Oil Co., Directo Oil Corp., Q-S Petroleum Inc., TLC Oil Co.

(MM) Includes Huron Valley Oil Co.
(NN) Includes Pioneer Oil Co., 76 Mini Mart.
(OO) Includes Easy Go Stores.

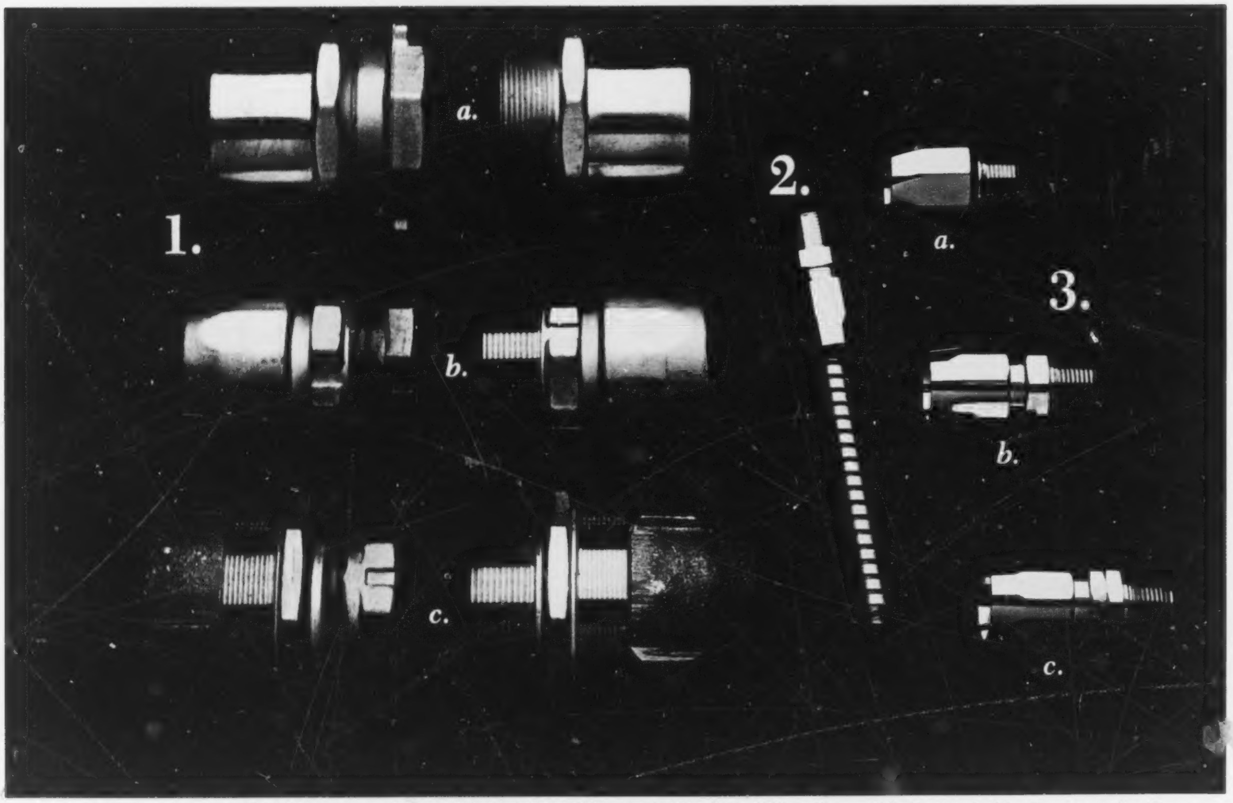
Product Distribution (cont'd.)

BULK PLANTS				TERMINALS				
	COMPANY OPERATED				COMPANY OPERATED			
Total	Salary operated	Commission operated	Jobber operated bulk plants	Total	Salary operated	Commission operated	Jobber operated terminals	INDEPENDENT OIL COMPANIES AND SELECTED OIL JOBBERS
0	0	0	0	0	0	0	0	**Petroleum Sales & Service**
2	2	0	0	0	0	0	0	**Phillips Fuel Co.**
1	1	0	0	0	0	0	0	**Piasa Motor Fuels Inc.**
0	0	0	0	0	0	0	0	Pilot Oil Corp.
0	0	0	0	0	0	0	0	Port Oil Co.
0	0	0	0	3	2	0	0	Power Test Corp.
0	0	0	0	0	0	0	0	**Pride Oil Co. (TN)**
0	0	0	0	0	0	0	0	**Pride Oil Co. (MS)**
0	0	0	0	0	0	0	0	**Private Brand Services**
2	2	0	0	0	0	0	0	W. H. Pugh Oil Co.
0	0	0	0	0	0	0	0	Pyramid Oil Co.
3	1	0	2	3	3	0	0	Quaker State Oil Ref. Corp.
4	4	0	0	0	0	0	0	**Quality Oil Co.**
0	0	0	0	9	—	—	—	**Quincy Oil**
0	0	0	0	0	0	0	0	**Quartrup Petroleum Co.**
0	0	0	0	0	0	0	0	Reinaur Petroleum Co.
5	5	0	0	0	0	0	0	Reinhardt Oil Corp.
0	0	0	0	0	0	0	0	Research Fuels Inc.
NA	—	—	—	NA	—	—	—	**R. I. Marketing, Inc. (TT)**
1	1	0	0	0	0	0	0	**River Oil Co.**
0	0	0	0	0	0	0	0	**Robinson Oil Co.**
0	0	0	0	0	0	0	0	Rocket Oil Co.
0	0	0	0	0	0	0	0	Ross Resources Inc.
2	0	2	0	0	0	0	0	Sahara Oil Co.
4	4	0	0	0	0	0	0	**Santel Oil Co.**
0	0	0	0	0	0	0	0	**Schaeffer Oil**
0	0	0	0	4	0	0	0	**Sears Oil Co.**
0	0	0	0	0	0	0	0	Self-Service Oil Co.
1	1	0	0	0	0	0	0	Shelby Petroleum Corp.
781	89	0	692	14	14	0	0	Shell Oil Co.
0	0	0	0	0	0	0	0	**Shotmeyer Bros. Petroleum**
0	0	0	0	0	0	0	0	**Shotmeyer Oil Corp.**
11	11	0	0	1	1	0	0	**SICO Co.**
0	0	0	0	0	0	0	0	Simon Oil Co.
0	0	0	0	1	1	0	0	Sing Oil Co.
1	0	1	0	0	0	0	0	Smith-Shafer Oil Co. (EE)
0	0	0	0	1	1	0	0	**Somerset Refinery**
2	2	0	0	0	0	0	0	**Southern Counties Oil Co.**
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	**Southern Union Ref. Co.**
8	0	8	0	1	1	0	0	Southland Oil Co.
3	3	0	0	—	—	—	—	Speedway Petroleum Co.
3	0	0	3 (GG)	0	0	0	0	The Spencer Companies
3	3	0	0	0	0	0	0	**M. Spiegel & Sons Oil Corp.**
6	6	0	0	0	0	0	0	**Standard Cycle & Auto Supply Co. (SCASCO)**
2	1	0	1	0	0	0	0	**Star Oil Co.**
0	0	0	0	0	0	0	0	Star Service & Petroleum
2	2	0	0	4	4	0	0	Steuart Petroleum Co. (xxx)
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	T. D. Streett & Co.
3	0	0	0	0	0	0	0	**Stormy Oil Co.**
0	0	0	0	0	0	0	0	**Sunshine Jr. Stores**
0	0	0	0	1	1	0	0	**Tanner Oil**
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	Target Enterprises
6	6	0	0	0	0	0	0	A. Tarricone (ATI)
0	0	0	0	2	2	0	0	Taylor Oil Co.
0	0	0	0	4	4	0	0	**Tesoro Oil**
3	3	0	0	0	0	0	0	**Thornhill Oil Co.**
—	—	—	—	8	8	0	0	**Time Oil Co.**
0	0	0	0	0	0	0	0	Tommy Oil Co.
0	0	0	0	0	0	0	0	Tooley Oil Co.
0	0	0	0	75	11	64	0	Tosco Corp.
10	2	0	8	6	6	0	0	**Total Petroleum**
3	3	0	0	0	0	0	0	**Town Pump**
0	0	0	0	0	0	0	0	**Transit Oil Co.**
0	0	0	0	0	0	0	0	Travelers Petroleum
0	0	0	0	0	0	0	0	Trenton Oil Co.
0	0	0	0	0	0	0	0	Triton Inc.
7	5	2	0	0	0	0	0	**Truax Corp.**
9	9	0	(x)	15	15	0	(x)	**Ultramar Petroleum**
0	0	0	0	0	0	0	0	**United States Oil Co.**
0	0	0	0	0	0	0	0	Wake Up Oil Co.
0	0	0	0	0	0	0	0	Warelubco Inc.
2	2	0	0	0	0	0	0	Webster Companies
(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	**West Penn Oil Co.**
2	2	0	(x)	(x)	(x)	(x)	(x)	**Western Marketing**
0	0	0	0	1	1	0	0	**Wickland Oil Co.**
2	2	0	0	0	0	0	0	Willard Oil Co.
0	0	0	0	0	0	0	0	A. T. Williams Oil
4	3	1	0	(x)	(x)	(x)	(x)	J. H. Williams Oil
3	3	0	0	1	1	0	0	**York Oil Co.**
0	0	0	0	0	0	0	0	**Young Oil Co.**
0	0	0	0	0	0	0	0	**Zarda Bros.**
6	0	3	3	2	2	0	0	Zephyr Inc.

(PP) Approximately.
(QQ) 11,468 jobber-operated stations.
(RR) Terminals and bulk plants.

(TT) Formerly Golden Imperial, merged into Rock Island Refining Corp.
(UU) Purchased Inter City Oil Co. of St. Cloud.
Source: NPN questionnaires.

Century Couplings: Setting the standards for the Industry



1. Fuel Oil Couplings. a. 520-H Permanent, ¾" to 4" b. Dubl-Grip® Reattachable, 1" to 1½" c. Super-Grip Reattachable, Compression-Type, ¾" to 4" 2. Spring Guards. Internal Guard for Gas Pump Coupling, ⅝", ¾", 1" 3. Gas Pump Couplings. a. 570-H Permanent, ⅝", ¾", 1" b. Dubl-Grip® Reattachable, ⅝", ¾", 1" c. Dubl-Grip® Swivel Reattachable, ⅝", ¾", 1".

The best couplings on the market are backed by a century of experience.

Since the time when cars had model letters instead of resort names, we've been making the finest permanent and reattachable gasoline pump and fuel oil couplings. We've led the world with features like Dubl-Grip®, that clings to the hose without squeezing or weakening it. We've invented special attaching equipment. And we created a special serrated interior chamber for our permanent couplings that locks in the hose and prevents leakage or wicking. At Century, we plan to go on innovating and bringing you the best quality couplings . . . until another Century comes along.

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century
BRASS PRODUCTS INC.

Branded Retail Outlets

Company	TOTAL BRANDED RETAIL OUTLETS*	TOTAL NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	New England						Middle Atlantic		
			Maine	N.H.	Vt.	Mass.	R.I.	Conn.	N.Y.	N.J.	Pa.
Agway Petroleum Corp.	187(B)	9	8	6	11	11	1	3	91	13	43
American Petrofina	4,037	20	—	—	—	—	—	—	—	—	—
Ashland Oil, Inc.	187	7	—	—	—	—	—	—	—	—	3
Atlantic Richfield Co.	4,363	24	—	10	12	205	67	132	320	155	1,116
The Augsbury Org.	115	2	—	—	8	—	—	—	107	—	—
Automatic Comfort Corp.	52	1	—	—	—	—	—	52	—	—	—
Avalon Petroleum	1	1	—	—	—	—	—	—	—	—	—
Bagwell Oil Co.	16	2	—	—	—	—	—	—	—	—	—
Best Oil Inc.	18	1	—	—	—	—	—	—	—	—	18
Browning Oil Co.	17	1	—	—	—	—	—	—	—	—	—
Bursaw Oil Corp.	40	2	—	3	—	37	—	—	—	—	—
By-Lo Oil Co.	4	1	—	—	—	—	—	—	—	—	—
CSC Oil Co.	22	2	—	—	—	—	—	—	—	—	—
Campbell Oil Co.	75	1	—	—	—	—	—	—	—	—	—
Cannon Oil Corp.	17	3	—	—	—	—	—	—	—	—	—
Cardon Oil Co.	50	5	—	—	—	—	—	—	—	—	—
Cel Oil Products Corp.	16	1	—	—	—	—	—	—	—	—	—
Cenex (xxx)	1,117	14	—	—	—	—	—	—	—	—	—
Center Independent Oil Co.	15	1	—	—	—	—	—	—	—	—	15
Certified Oil Co.	200	3	—	—	—	—	—	—	—	—	—
Chevron U.S.A.	12,111	39	91	22	—	67	11	203	521	249	207
Cibro Petroleum	104	1	—	—	—	—	—	—	104	—	—
Citgo Petroleum Corp. (A)	3,915	31	158	70	55	162	5	82	392	252	82
Coen Oil Co.	350	3	—	—	—	—	—	—	—	—	130
Colonial Oil Ind. Inc.	65	3	—	—	—	—	—	—	—	—	—
Comet Oil Co.	4	2	—	—	—	—	—	—	—	—	—
Conna Corp.	267	9	—	4	—	—	—	—	13	—	—
Conoco Inc.	5,091	40	—	—	—	—	—	—	11	7	17
Crown Central Petroleum Corp.	200(C)	8	—	—	—	—	—	—	(x)	(x)	(x)
Crystal Flash Petroleum Corp.	17	1	—	—	—	—	—	—	—	—	—
Crystal/USA Oil Co.	79	5	—	—	—	—	—	—	—	—	—
K. E. David Ltd.	20	1	—	—	—	—	—	—	—	—	20
Davis-Howland Oil Inc.	1	1	—	—	—	—	—	—	1	—	—
DeBlois Oil Co.	50	2	—	—	—	12	38	—	—	—	—
Derby Refining Co.	529	12	—	—	—	—	—	—	—	—	—
Diamond Shamrock Corp.	1,993	25	—	—	—	—	—	—	4	—	2
Dixie Oil Co.	97	3	—	—	—	—	—	—	—	—	—
Drake's Refinery Stations	11	1	—	—	—	—	—	—	—	—	—
East Coast Oil Corp.	32	1	—	—	—	—	—	—	—	—	—
Englefield Oil Co.	152	2	—	—	—	—	—	—	—	—	—
Este Oils Co.	25	1	—	—	—	—	—	—	—	—	—
Exxon Co. U.S.A.	18,707	41	262	102	1	296	45	187	478	765	1,149
FCX, Inc.	98	2	—	—	—	—	—	—	—	—	—
Farmland Industries	1,100	15	—	—	—	—	—	—	—	—	—
Farm Stores	250	1	—	—	—	—	—	—	—	—	—
Fireline Petroleum	500	11	36	29	9	129	46	56	65	24	5
Fisca Oil Co.	102	22	—	—	—	—	1	3	—	3	10
Don Foster Oil Co.	30	1	—	—	—	—	—	—	—	—	—
Gas-N-Go	1	1	—	—	—	—	—	—	—	—	—
Gastown	196	1	—	—	—	—	—	—	—	—	—
Gate Petroleum Co.	80	8	—	—	—	—	—	—	—	—	—
Gem Petroleum	307	2	—	—	—	—	—	—	—	—	—
Getty Ref. & Marketing Co. (xxx)	4,494	28	99	79	71	253	68	166	551	470	205
Gresham Petroleum Co.	12	1	—	—	—	—	—	—	—	—	—
Gulf Ref. & Marketing Co.	15,103	33	226	145	104	290	63	148	429	600	871
Angus I. Hines Inc.	60	1	—	—	—	—	—	—	—	—	—
Holland Oil Co. (OH)	53	1	—	—	—	—	—	—	—	—	—
Hop-In Food Stores	112	3	—	—	—	—	—	—	—	—	—
Hudson Oil Co. & Affiliated Cos.	235	27	—	—	—	—	—	—	(x)	—	(x)
Hughes Oil Co.	110	1	—	—	—	—	—	—	—	—	—
Hull Oil Co.	20	2	—	—	—	—	—	—	—	—	—
Inter-City Oil Co. of St. Cloud (E)											
J & L Oil Inc.	65	3	—	—	—	—	—	—	—	—	—
Johnson Products	40	5	23	8	4	1	—	—	4	—	—
Kenan Oil Co.	27	1	—	—	—	—	—	—	—	—	—
Kerr-McGee Ref. Corp.	1,785	21	—	—	—	—	—	—	—	—	—
Kickapoo Oil Co.	55	1	—	—	—	—	—	—	—	—	—
Kimber-Allen Petroleum Corp.	175	1	—	—	—	—	—	—	—	175	—
Kimbro Oil Co.	38	1	—	—	—	—	—	—	—	—	—
Kingston Oil Supply Corp.	62	1	—	—	—	—	—	—	62	—	—
Kirschner Bros. Oil Co.	35	2	—	—	—	—	—	—	—	15	20
Kocolene Oil Corp.	78	8	—	—	—	—	—	—	—	—	7
Land O' Lakes (MN)	392	6	—	—	—	—	—	—	—	—	—
LePaul Oil Co.	14	4	—	—	—	—	—	—	—	—	—

---

*Total branded retail outlets include garages, motels, C-stores, and service stations. By U.S. Census Bureau definition, only establishments generating 50% or more of their income from the sale of petroleum products and services are service stations.

†Total number of states where gasoline is branded includes the District of Columbia.

in the United States

South Atlantic									East North Central					East South Central			
Del.	Md.	D.C.	Va.	W.Va.	N.C.	S.C.	Ga.	Fla.	Ohio	Ind.	Ill.	Mich.	Wis.	Ky.	Tenn.	Ala.	Miss.
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	8	—	111	190	542	520	—	—	3	—	—	6	247	136	35
—	—	—	2	25	—	—	—	—	61	2	2	—	—	92	—	—	—
44	90	4	90	25	1	—	—	—	6	—	187	6	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	1	—	—	—	—	—	—
—	1	—	15	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	17	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	4	—	—	—	—	—
—	—	—	—	—	—	—	—	—	13	—	—	—	—	9	—	—	—
—	—	—	—	—	—	—	—	—	75	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	1	2	—	—	—	—	—	—	—	14	—
—	—	—	1	—	—	—	—	—	—	—	1	—	—	—	—	—	—
—	—	—	—	—	—	16	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	164	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	10	—	—	—	—	180	—	—	—	—	10	—	—	—
24	45	—	21	108	62	104	1,092	1,144	4	11	—	—	—	1,091	138	1,062	631
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	21	—	116	8	174	50	191	407	34	134	252	121	214	32	68	211	70
—	—	—	—	20	—	—	—	—	200	—	—	—	—	—	—	—	—
—	—	—	—	—	6	28	31	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	2	2	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	12	—	—	15	—	26	29	—	—	148	19	—	—
2	—	—	33	12	32	20	38	37	54	35	82	50	61	18	62	52	50
—	(x)	—	(x)	—	(x)	(x)	(x)	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	17	—	—	—	—	—	—	—
—	—	—	—	—	—	—	2	11	—	—	—	—	—	—	3	61	2
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	40	—	—	4	2	—	—
—	—	—	14	—	2	4	2	5	—	—	—	—	—	1	5	—	—
—	—	—	—	—	—	—	65	30	—	—	—	—	—	—	—	2	—
—	—	—	—	—	—	—	—	—	—	—	—	11	—	—	—	—	—
—	—	—	32	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	27	—	—	—	—	125	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	25	—	—	—	—	—	—	—	—
83	518	59	1,053	593	1,906	995	631	569	30	1	—	—	—	—	959	385	243
—	—	—	—	—	84	14	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	45	—	20	—	—	—	—
—	—	—	—	—	—	—	—	250	—	—	—	—	—	—	—	—	—
4	—	—	—	—	—	—	—	106	—	—	—	—	—	—	—	—	—
—	5	—	14	—	—	—	4	—	5	1	4	8	2	1	—	2	1
—	—	—	—	—	—	—	—	—	—	—	—	30	—	—	—	—	—
—	—	—	—	—	—	—	—	—	1	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	196	—	—	—	—	—	—	—	—
—	—	—	6	2	7	19	12	32	—	—	—	—	—	11	3	—	—
—	—	—	—	—	—	—	50	257	—	—	—	—	—	—	—	—	—
41	51	—	1	—	—	—	—	—	—	—	90	6	145	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	12
67	248	30	641	229	1,012	552	1,039	795	441	42	—	10	—	537	798	637	509
—	—	—	60	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	53	—	—	—	—	—	—	—	—
—	—	—	53	—	42	—	—	—	—	—	—	—	—	—	17	—	—
—	(x)	—	(x)	(x)	—	—	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
—	—	—	—	—	—	—	—	110	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	19	—	—	—	—	—	—	—	1	—
—	—	—	—	—	—	—	6	—	—	—	45	—	14	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	27	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	1	—	—	—	—	—	—	28	108	4	114	10	26	1	3
—	—	—	—	—	—	—	—	—	—	—	—	—	55	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	38	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
3	3	—	—	—	—	—	—	—	20	33	2	—	—	8	2	—	—
—	—	—	—	—	—	—	—	—	—	—	—	3	79	—	—	—	—
—	—	—	—	—	—	—	—	—	5	3	3	2	—	—	—	—	—

(xxx) Latest data available. Company either did not respond to the 1984 questionnaire or did not answer all of the questions fully.
(x) Company did not disclose the number of outlets.
(A) Owned by The Southland Corp.

Branded Retail Outlets (cont'd.)

Company	TOTAL BRANDED RETAIL OUTLETS*	TOTAL NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	New England						Middle Atlantic		
			Maine	N.H.	Vt.	Mass.	R.I.	Conn.	N.Y.	N.J.	Pa.
Lido Co. of New England	85	3	30	45	—	10	—	—	—	—	—
M.F.A. Oil Co.	200	2	—	—	—	—	—	—	—	—	—
Main Bros. Oil Co.	30	1	—	—	—	—	—	—	30	—	—
Marathon Petroleum Co.	2,210	5	—	—	—	—	—	—	—	—	—
Marshall Oil Co.	50	1	—	—	—	—	—	—	—	—	—
Martin Oil Marketing Ltd.	92	11	—	—	—	—	—	—	—	—	3
Mauger & Co.	44	2	—	—	—	—	—	—	—	—	41
McDowell Oil Service	28	1	—	—	—	—	—	—	—	—	28
Mercury Oil Co.	160	1	—	—	—	—	—	160	—	—	—
Mico Oil Co.	24	10	—	—	—	—	—	—	—	—	—
Mid Continent Systems	45	6	—	—	—	—	—	—	—	—	—
Mid-States Petroleum	75	3	—	—	—	—	—	—	—	—	—
Midwest Petroleum Co.	100	2	—	—	—	—	—	—	—	—	—
Miller Enterprises, Inc.	39	1	—	—	—	—	—	—	—	—	—
Miller & Holmes	(x)	9	—	—	—	—	—	—	—	—	—
Miller Oil Co. (OH)	4	1	—	—	—	—	—	—	—	—	—
Miller Oil Co. (VA)	52	1	—	—	—	—	—	—	—	—	—
Minute Man Service	356	3	—	—	—	—	—	—	156	—	188
Mobil Oil Corp.	15,403	43	261	176	216	638	86	486	2,025	467	1,191
Monarch Oil & Supply Co.	28	1	—	—	—	—	—	—	—	—	—
Munford, Inc.	471	14	—	—	—	—	—	—	—	—	—
Murphy Oil Corp.	614	14	—	—	—	—	—	—	—	—	—
Musket Corp.	120	1	—	—	—	—	—	—	—	—	—
National Convenience Stores	60	5	—	—	—	—	—	—	—	—	—
National Oil & Gas	84	2	—	—	—	—	—	—	—	—	—
Noco Energy Corp.	15	1	—	—	—	—	—	—	15	—	—
Northville Ind. Corp.	30	1	—	—	—	—	—	—	30	—	—
Osceola Refining Co.	10	1	—	—	—	—	—	—	—	—	—
Parker Oil Co., Inc.	250	2	—	—	—	—	—	—	—	—	—
Pester Corp.	205	10	—	—	—	—	—	—	—	—	—
Petroleum Marketers Inc.	31	1	—	—	—	—	—	—	—	—	—
Petroleum Products Corp.	6	1	—	—	—	—	—	—	—	—	6
Petroleum Sales & Service	4	1	—	—	—	—	—	—	4	—	—
Phillips Fuel Co.	80	1	—	—	—	—	—	—	—	80	—
Phillips Petroleum Co.	11,827	37	—	—	—	—	—	—	—	—	101
Piasa Motor Fuels Inc.	25	2	—	—	—	—	—	—	—	—	—
Pilot Oil Corp.	101	11	—	—	—	—	—	—	—	—	1
Port Oil Co.	58	2	—	—	—	—	—	—	—	—	—
Power Test Corp.	475	5	—	—	—	30	—	30	372	41	2
Pride Oil Co. (TN)	12	1	—	—	—	—	—	—	—	—	—
Pride Oil Co. (MS)	25	2	—	—	—	—	—	—	—	—	—
Private Brand Services	1	1	—	—	—	—	—	—	—	—	—
W.H. Pugh Oil Co.	15	1	—	—	—	—	—	—	—	—	—
Pyramid Oil Co.	45	1	—	—	—	—	—	—	—	45	—
Quaker State Oil Ref. Corp.	202	4	—	—	—	—	—	—	52	—	51
Quality Oil Co.	110	2	—	—	—	—	—	—	—	—	—
Quincy Oil	5	1	—	—	—	5	—	—	—	—	—
Reinaur Petroleum Co.	43	1	—	—	—	—	—	—	—	43	—
Reinhardt Oil Corp.	35	1	—	—	—	—	—	—	35	—	—
R. I. Marketing Inc. (D)	202	(x)	—	—	—	—	—	—	—	—	—
River Oil Co.	23	1	—	—	—	—	—	—	—	—	—
San Ann Service	69	2	—	—	—	—	—	—	—	—	—
Santee Oil Co.	58	1	—	—	—	—	—	—	—	—	—
Sears Oil Co.	12	1	—	—	—	—	—	—	12	—	—
Self-Service Oil Co.	18	4	—	—	—	—	—	—	—	—	—
Shelby Petroleum Corp.	20	2	—	—	—	—	—	—	—	—	—
Shell Oil Company	12,147	40	—	9	—	181	43	136	261	209	8
Sherer Oil Co.	16	1	—	—	—	—	—	—	—	—	16
Shotmeyer Bros. Petroleum Corp	70	1	—	—	—	—	—	—	—	70	—
Shotmeyer Oil Corp.	36	3	—	—	—	—	—	—	1	34	1
Sico Co.	145	2	—	—	—	—	—	—	—	—	144
Simon Oil Co.	125	1	—	—	—	—	—	—	125	—	—
Sing Oil Co.	75	4	—	—	—	—	—	—	—	—	—
Smith-Shafer Oil Co.	8	2	—	—	—	—	—	—	—	—	—
Somerset Refinery	30	1	—	—	—	—	—	—	—	—	—
Southern Oil Co.	12	1	—	—	—	—	—	—	—	—	—
Southland Oil Co.	50	1	—	—	—	—	—	—	—	—	—
Speedway Petroleum Co.	18	2	—	2	—	16	—	—	—	—	—
The Spencer Companies	103	1	—	—	—	—	—	—	—	—	—
M. Spiegel & Sons Oil Corp.	34	1	—	—	—	—	—	—	34	—	—
Standard Cycle & Auto Supply Co. (SCASCO)	40	1	—	—	—	—	—	40	—	—	—
Standard Oil Co. (Indiana)	17,800	35	—	—	—	296	30	207	418	516	890
Standard Oil Co. (Ohio)	3,100	20	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)	(x)
Star Oil Co.	58	1	—	—	—	—	—	—	—	—	—

(B) Direct op leased only
(C) Approximately
(D) Formerly Golden Imperial, merged with Rock Island Ref. Corp.

South Atlantic									East North Central					East South Central			
Del.	Md.	D.C.	Va.	W.Va.	N.C.	S.C.	Ga.	Fla.	Ohio	Ind.	Ill.	Mich.	Wis.	Ky.	Tenn.	Ala.	Miss.
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	50	—	150
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	747	517	276	576	—	94	—	—	—
—	—	—	—	—	50	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	5	—	3	18	44	10	3	—	—	—	—
—	3	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	9	—	1	1	—	1	1	—	—
—	—	—	—	—	—	—	2	—	—	—	—	—	—	1	1	15	10
—	—	—	—	—	—	—	—	—	1	1	—	73	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	30	—	—	—	—	—	—
—	—	—	—	—	—	—	—	39	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	(x)	—	—	—	(x)	(x)	—	—	—	—
—	—	—	—	—	—	—	—	—	4	—	—	—	—	—	—	—	—
—	—	—	52	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	12	—	—	—	—	—	—	—	—
88	163	2	212	21	278	41	44	326	380	221	318	756	716	35	301	1	—
—	—	—	—	—	—	—	—	—	—	28	—	—	—	—	—	—	—
—	—	—	13	—	15	39	90	80	—	—	—	1	—	4	22	24	35
—	—	—	17	—	23	9	46	125	—	—	—	5	96	5	59	100	21
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	(x)	—	—
—	—	—	—	—	—	—	1	1	—	—	—	—	—	—	22	—	2
—	—	—	—	—	—	—	—	—	4	80	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	10	—	—	—	—	—
—	—	—	244	—	6	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	1	—	—	—	1	—	—
—	—	—	31	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	124	—	349	69	684	358	433	547	141	443	624	129	302	152	317	363	265
—	—	—	—	—	—	—	—	—	—	—	23	—	—	—	—	—	—
—	—	—	15	1	9	[illegible]	8	9	2	—	—	—	—	12	41	2	—
—	—	—	—	—	21	37	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	12	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	23	2
—	—	—	—	—	—	—	—	—	—	—	—	—	1	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	15	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	50	—	—	—	—	49	—	—	—	—	—	—	—	—
—	—	—	3	—	107	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	23	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	1	68	—
—	—	—	—	—	—	58	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	4	—	8	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	11	9	—	—
13	243	9	388	2	570	372	467	720	533	387	718	733	175	341	374	430	332
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	59	9	—	—	—	—	—	—	—	1	6
—	—	—	—	—	—	—	—	2	—	—	6	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	30	—	—	—
—	—	—	12	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	50
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	103	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
34	375	56	671	—	1,135	506	768	986	474	760	1,301	799	623	—	854	1,314	637
(x)	(x)	(x)	(x)	(x)	(x)	—	—	—	(x)	(x)	—	(x)	—	(x)	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	58	—	—	—	—	—

(E) Purchased by Stormy Oil Co

Source: NPN questionnaires and 1983 Factbook

Branded Retail Outlets (cont'd.)

Company	TOTAL BRANDED RETAIL OUTLETS*	TOTAL NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	New England						Middle Atlantic		
			Maine	N.H.	Vt.	Mass.	R.I.	Conn.	N.Y.	N.J.	Pa.
Star Service & Petroleum Co.	(x)	15	—	—	—	—	—	—	—	—	—
Sumrall Oil Services	92	1	—	—	—	—	—	—	—	—	—
Sun Co.	6,808	27	87	78	36	421	103	154	970	595	936
Sunshine Jr. Stores	322	3	—	—	—	—	—	—	—	—	—
Tanner Oil Co.	97	3	—	—	—	—	—	—	—	—	—
A. Tarricone (ATI)	150	3	—	—	—	—	—	(x)	(x)	(x)	—
Taylor Oil Co.	57	2	—	—	—	—	—	—	—	—	—
Tenneco Oil Co.	418	15	—	—	—	—	—	3	—	—	1
Texaco Inc. (xxx)	18,692	45	193	114	90	476	108	305	857	316	1,186
Thornhill Oil Co.	23	1	—	—	—	—	—	—	—	—	—
Thornton Oil Corp.	90	15	—	—	—	—	—	4	5	—	—
Tommy Oil Co., Inc.	27	11	—	—	—	—	—	—	4	—	2
Total Petroleum	1,863	22	—	—	—	—	—	—	—	—	—
Transit Oil Co.	15	2	—	—	—	—	—	—	—	—	—
Travelers Petroleum	83	3	—	—	—	—	—	—	—	—	—
Trenton Oil Co.	50	1	—	—	—	—	—	—	—	50	—
Triton Inc.	42	4	—	—	—	—	—	—	—	—	—
Ultramar Petroleum Inc.	2	1	—	—	—	—	—	—	2	—	—
Union Oil Co. of Calif.	11,221	44	—	—	—	—	—	2	2	2	38
United Ref. Co.	450	(x)	—	—	—	—	—	—	—	—	—
United States Oil Co.	5	1	—	—	—	—	—	—	—	—	—
Wake Up Oil Co.	43	1	—	—	—	—	—	—	—	—	—
Warelubco	92	(x)	—	—	—	—	—	—	—	—	—
Willard Oil Co.	25	1	—	—	—	—	—	—	—	—	—
A.T. Williams Oil	67	2	—	—	—	—	—	—	—	—	—
J.H. Williams Oil Co.	87	1	—	—	—	—	—	—	—	—	—
York Oil Co.	14	1	—	—	—	—	—	—	—	—	—
Young Oil	11	1	—	—	—	—	—	—	—	—	—
Zephyr, Inc.	50	2	—	—	—	—	—	—	—	—	—

Company	TOTAL BRANDED RETAIL OUTLETS*	TOTAL NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	West North Central						
			Minn.	Iowa	Mo.	N.D.	S.D.	Neb.	Kan.
ADA Resources	143	1	—	—	—	—	—	—	—
American Petrofina Inc.	4,037	20	—	15	163	—	1	24	145
Arkla Chemical Corp.	4	3	—	—	—	—	—	—	—
Armour Oil Co.	85	5	—	—	—	—	—	—	—
Atlantic Richfield Co.	4,363	24	—	—	—	—	—	—	—
Beacon Oil Co.	268	3	—	—	—	—	—	—	—
Brennan Petroleum Products Co.	3	1	—	—	—	—	—	—	—
Cardon Oil Co.	50	5	—	—	—	—	—	—	—
Cenex (xxx)	1,117	14	250	100	—	172	107	65	1
Chapman, Inc.	67	3	—	—	—	—	—	—	—
Chevron, U.S.A.	12,111	39	—	—	—	—	—	1	—
Citgo Petroleum Corp. (A)	3,915	31	14	—	7	—	—	—	—
Conna Corp.	267	9	—	1	—	—	—	—	—
Conoco Inc.	5,091	40	183	245	294	72	48	232	227
Cook & Cooley Inc.	75	1	—	—	—	—	—	—	—
Cory's Gasoline Stations Inc.	3	1	—	—	—	—	—	—	—
Curt's Oil Co.	7	1	—	—	—	—	—	—	—
Derby Refining Co.	529	12	9	111	106	—	3	47	169
Desert Oil Co.	7	1	—	—	—	—	—	—	—
Diamond Shamrock Corp.	1,993	25	—	12	—	—	—	18	31
Dickey Inc.	6	1	—	6	—	—	—	—	—
Exxon Co. U.S.A.	18,707	41	—	—	—	66	7	3	—
Farmland Industries	1,100	15	—	189	66	34	62	149	266
Fill-Up Inc.	30	1	—	—	—	—	—	—	—
Fisca Oil Co.	102	22	—	3	5	—	1	3	2
Fletcher Oil Co.	15	3	—	—	—	—	—	—	—
Flying J Inc.	59	9	—	—	7	—	—	—	—
Franko Oil Co.	92	3	—	—	—	—	—	—	—
Gasco Gasoline	104	1	—	—	—	—	—	—	—
General Oil Co.	52	2	—	—	2	—	—	—	—
Getty Refining & Marketing Co. (xxx)	4,494	28	310	332	465	36	35	168	316
Giant Industries Inc.	12	2	—	—	—	—	—	—	—

---

*Total branded retail outlets include garages, motels, C-stores, and service stations. By U.S. Census Bureau definition, only establishments generating 50% or more of their income from the sale of petroleum products and services are service stations.

†Total number of states where gasoline is branded includes the District of Columbia.

South Atlantic									East North Central					East South Central			
Del.	Md.	D.C.	Va.	W.Va.	N.C.	S.C.	Ga.	Fla.	Ohio	Ind.	Ill.	Mich.	Wis.	Ky.	Tenn.	Ala.	Miss.
—	—	—	—	—	—	(x)	(x)	(x)	(x)	(x)	(x)	—	—	(x)	(x)	(x)	(x)
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	92
28	180	20	132	107	243	15	—	146	623	262	291	415	—	141	28	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	119	30
—	—	—	—	28	—	—	—	—	42	—	—	—	—	23	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	9	—	48	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	7	3	25	35	45	117	—	—	—	—	—	11	41	22	10
68	346	17	1,081	26	1,300	616	713	324	—	201	514	2	16	338	859	904	335
—	—	—	—	—	—	—	—	—	—	23	—	—	—	—	—	—	—
—	1	—	6	—	11	3	5	6	11	7	6	2	—	15	1	—	—
—	—	—	—	—	—	—	1	4	8	—	—	—	—	—	3	1	—
—	—	—	—	—	—	—	—	—	3	5	10	514	30	3	19	5	—
—	—	—	—	—	—	—	—	—	—	4	—	—	—	11	—	—	—
—	—	—	—	—	—	70	8	5	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	4	—	10	8	20	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	10	—	427	250	723	303	607	774	650	361	362	638	354	169	530	980	481
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	5	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	43	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	25	—	—	—	—	—	—	—	—	—	—	—
—	—	—	28	—	39	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	87	—	—	—	—	—	—	—	—	—
—	—	—	14	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	11	—
—	—	—	—	—	—	—	—	—	—	—	—	45	5	—	—	—	—

West South Central				Mountain								Pacific				
Ark.	La.	Okla.	Texas	Mont.	Idaho	Wyo.	Colo.	N.M.	Ariz.	Utah	Nev.	Wash.	Ore.	Calif.	Alaska	Hawaii
—	—	—	143	—	—	—	—	—	—	—	—	—	—	—	—	—
171	135	139	1,301	—	—	—	—	145	—	—	—	—	—	—	—	—
2	1	—	1	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	1	—	2	42	1	39	—	—
—	—	—	—	—	—	—	—	—	34	8	34	296	208	1.294	—	19
—	—	—	—	—	—	—	—	—	—	—	4	—	2	262	—	—
—	—	—	—	—	—	—	—	—	3	—	—	—	—	—	—	—
—	—	5	—	—	—	—	—	—	42	2	—	—	—	—	—	—
—	—	—	—	109	52	8	7	—	—	16	—	77	49	—	—	—
13	—	2	52	—	—	—	—	—	—	—	—	—	—	—	—	—
39	1	—	211	76	158	37	108	239	259	168	131	583	401	2.458	159	174
117	215	34	167	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
156	445	351	670	308	79	82	410	160	4	142	15	139	—	156	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	75	—	—
—	—	—	—	—	—	—	—	—	3	—	—	—	—	—	—	—
—	—	7	—	—	—	—	—	—	—	—	—	—	—	—	—	—
4	—	27	7	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	7	—	—	—	—	—	—	—	—	—	—
28	24	120	1,360	—	8	19	129	95	4	54	2	12	—	38	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
698	909	118	2.954	293	58	27	137	172	316	21	33	312	170	1.103	—	—
3	—	90	84	6	1	15	70	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	30	—	—	—
—	—	—	21	—	—	—	3	—	—	—	—	—	—	—	—	—
—	—	—	—	—	2	—	—	—	—	—	—	3	10	—	—	—
—	—	—	—	3	4	1	—	—	—	5	1	20	3	15	—	—
—	—	—	—	—	—	—	—	—	—	—	—	14	73	5	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	104	—	—
50	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1	—	355	5	—	—	2	86	—	—	—	—	—	—	68	—	—
—	—	—	—	—	—	—	—	2	10	—	—	—	—	—	—	—

(xxx) Latest data available. Company either did not respond to the 1984 questionnaire or did not answer all of the questions fully.
(x) Company did not disclose the number of outlets.
(A) Owned by The Southland Corp.

Branded Retail Outlets (cont'd.)

Company	TOTAL BRANDED RETAIL OUTLETS*	TOTAL NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	West North Central						
			Minn.	Iowa	Mo.	N.D.	S.D.	Neb.	Kan.
Jack Griffith Petroleum Products	14	1	—	—	—	—	—	—	—
Gulf Ref. & Marketing Co.	15,103	33	—	—	2	—	—	—	—
Gull Industries	110	2	—	—	—	—	—	—	—
Harrell Petroleum Co	25	1	—	—	—	—	—	—	—
Harris Enterprises	20	1	—	—	—	—	—	—	—
Hinkle Distributors	9	1	—	—	—	—	—	—	—
Barney Holland Oil Co.	68	1	—	—	—	—	—	—	—
Hornet Oil Co.	37	6	—	—	—	—	—	—	(x)
Hudson Oil Co. & Affiliated Cos.	235	27	(x)	(x)	(x)	—	—	(x)	(x)
Inter-City Oil Co. of St. Cloud (E)									
JS & J Service Inc	19	2	—	—	—	—	—	—	—
Jones Oil Co	6	1	—	—	6	—	—	—	—
Kaibab Industries	30	1	—	—	—	—	—	—	—
Kellett Oil Co.	3	1	—	—	3	—	—	—	—
Kerr-McGee Ref. Corp.	1,785	21	54	149	131	9	30	111	151
Kittie Petroleum Inc	15	1	—	—	—	—	—	—	—
Krause Gentle Oil Corp	57	1	—	57	—	—	—	—	—
Kwik Shop Inc	100	3	—	26	—	—	—	27	47
Land O' Lakes (MN)	392	6	101	135	—	5	—	69	—
M.F.A. Oil Co.	200	2	—	—	150	—	—	—	—
Martin Oil Marketing Ltd.	92	11	1	2	—	—	—	—	—
Merchants Oil	60	2	—	—	—	—	—	—	—
Merritt Truax	60	1	—	—	—	—	—	—	—
Mico Oil Co	24	10	4	—	2	1	2	—	2
Mid Continent Systems	45	6	—	—	—	—	—	—	—
Mid-Missouri Oil Co.	6	1	—	—	6	—	—	—	—
Midwest Petroleum	100	2	—	—	70	—	—	—	—
Miller & Holmes	(x)	9	(x)	(x)	—	(x)	(x)	(x)	—
Missouri Terminal Oil Co	16	1	—	—	16	—	—	—	—
Mobil Oil Corp	15,403	43	481	186	478	105	139	141	111
Munford, Inc.	471	14	—	—	1	—	—	—	—
Murphy Oil Corp.	614	14	60	—	—	—	—	—	—
Musket Corp.	120	9	—	—	(x)	—	—	—	(x)
National Convenience Stores	60	5	—	—	—	—	—	—	—
Neal Inc	35	1	—	—	—	—	—	—	—
Newell Oil Co	12	1	—	—	—	—	—	—	—
Pacer Oil Co.	17	2	—	—	—	—	—	—	—
Pacific Northern Oil Corp.	44	1	—	—	—	—	—	—	—
Curtis Parker Oil Co.	45	1	—	—	—	—	—	—	—
Peavy Oil Co	4	1	—	—	—	—	—	—	—
Pester Corp	205	10	13	94	21	—	5	14	16
Phillips Petroleum Co	11,827	37	471	457	808	29	136	323	377
Piasa Motor Fuels Inc.	25	2	—	—	2	—	—	—	—
Quartrup Petroleum Co.	7	1	—	—	—	—	—	—	—
Research Fuels Inc.	2	1	—	—	—	—	—	—	—
Robinson Oil Co	22	1	—	—	—	—	—	—	—
Ross Resources Inc	20	2	—	—	—	—	—	—	19
Sahara Oil Co., Inc	23	1	—	—	—	—	—	—	—
Schaeffer Oil	26	5	2	—	—	7	6	4	—
Self-Service Oil Co.	18	4	—	1	5	—	—	—	—
Shaver & McCarthy Inc.	2	1	2	—	—	—	—	—	—
Shell Oil Company	12,147	40	—	52	257	—	—	—	—
Southern Counties Oil Co	4	1	—	—	—	—	—	—	—
Standard Oil Co. (Indiana)	17,800	35	675	374	607	214	252	212	293
Standard Oil Co. (Ohio)	2,100	20	—	—	—	—	—	—	—
Star Service & Petroleum Co.	(x)	15	—	—	(x)	—	—	(x)	(x)
Stormy Oil Co.	7	1	7	—	—	—	—	—	—
Sun Co	6,808	27	—	236	271	—	—	—	—
Sunshine Jr. Stores	322	3	—	—	—	—	—	—	—
Target Enterprises (CA)	100	1	—	—	—	—	—	—	—
Tenneco Oil Co.	418	15	—	—	—	—	—	—	—
Tesoro Petroleum Corp.	91	2	—	—	—	—	—	—	—
Texaco Inc. (xxx)	18,692	45	—	—	126	—	34	64	—
Thornton Oil Corp	90	15	—	—	—	—	—	—	—
Time Oil Co	240	5	—	—	—	—	—	—	—
Tommy Oil Co., Inc	27	11	—	—	1	—	—	—	1
Tooley Oil Co.	10	2	—	—	—	—	—	—	—
Total Petroleum Inc.	1,863	22	56	125	370	7	20	76	302
Town Pump	61	1	—	—	—	—	—	—	—
Traux Corp	65	2	—	—	—	—	—	—	—
Union Oil Co. of Calif	11,221	44	269	75	10	1	10	3	1
Webster Companies	18	1	—	—	18	—	—	—	—
Western Marketing	25	1	—	—	—	—	—	—	—
Wickland Oil Co.	85	3	—	—	—	—	—	—	—
Zarda Bros	19	2	—	—	12	—	—	—	7

(B) Direct op leased only
(C) Approximately
(D) Formerly Golden Imperial, merged with Rock Island Ref. Corp

West South Central				Mountain								Pacific				
Ark.	**La.**	**Okla.**	**Texas**	**Mont.**	**Idaho**	**Wyo.**	**Colo.**	**N.M.**	**Ariz.**	**Utah**	**Nev.**	**Wash.**	**Ore.**	**Calif.**	**Alaska**	**Hawaii**
—	—	14	—	—	—	—	—	—	—	—	—	—	—	—	—	—
598	752	371	2,725	—	—	—	—	118	1	—	—	—	—	3	—	—
—	—	—	—	—	—	—	—	—	—	—	—	85	25	—	—	—
—	—	—	25	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	20	—	—	—
—	—	—	9	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	68	—	—	—	—	—	—	—	—	—	—	—	—	—
(x)	(x)	(x)	(x)	—	—	—	—	(x)	—	—	—	—	—	—	—	—
—	(x)	—	—	—	—	—	(x)	—	(x)	—	(x)	(x)	—	(x)	—	—
—	—	—	—	—	—	—	—	—	1	—	—	—	—	18	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	30	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
223	3	372	218	—	—	—	—	39	—	—	—	—	—	—	—	—
—	—	—	15	—	—	—	—	—	—	—	—	—	—	—	—	—
—	7	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	1	—	—	—	—	—	—	—	—	—	—	2	—	—
—	—	—	—	—	—	1	59	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	60	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	16	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	(x)	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
82	265	80	1,184	—	—	—	—	22	174	—	25	381	322	1,578	—	—
21	59	—	67	—	—	—	—	—	—	—	—	—	—	—	—	—
15	33	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
(x)	(x)	(x)	(x)	—	—	—	(x)	(x)	—	—	—	—	—	—	—	—
—	—	—	34	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	35	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	12	—	—	—	—	—	—	—	—	—	—	—	—	—
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—	—	—	—	—	—	3	37	—	—	—	—	—	—	—	—	—
322	216	659	1,590	—	186	63	357	213	15	186	8	2	8	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
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131	475	—	643	—	56	—	15	134	91	22	66	413	362	1,704	—	71
—	—	—	—	—	—	—	—	—	—	—	—	—	—	4	—	—
—	684	—	258	—	113	123	259	—	—	26	—	—	—	—	—	—
(x)	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	(x)	(x)	—	—	—	—	—	—	—	—	—	—	—	—	—
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32	—	258	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	8	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	100	—	—
—	42	—	42	—	—	—	14	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	17	74	—
438	868	493	2,119	—	79	74	286	177	196	154	56	468	392	1,221	92	50
—	—	—	7	—	—	—	—	—	—	—	—	—	—	—	—	—
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—	—	—	—	—	—	—	—	—	—	—	1	—	—	9	—	—
21	6	174	25	—	—	—	46	11	35	—	—	—	—	—	—	—
—	—	—	—	61	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	5	65	—	—	—
72	30	3	81	4	15	4	1	2	138	36	53	344	254	1,903	106	143
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
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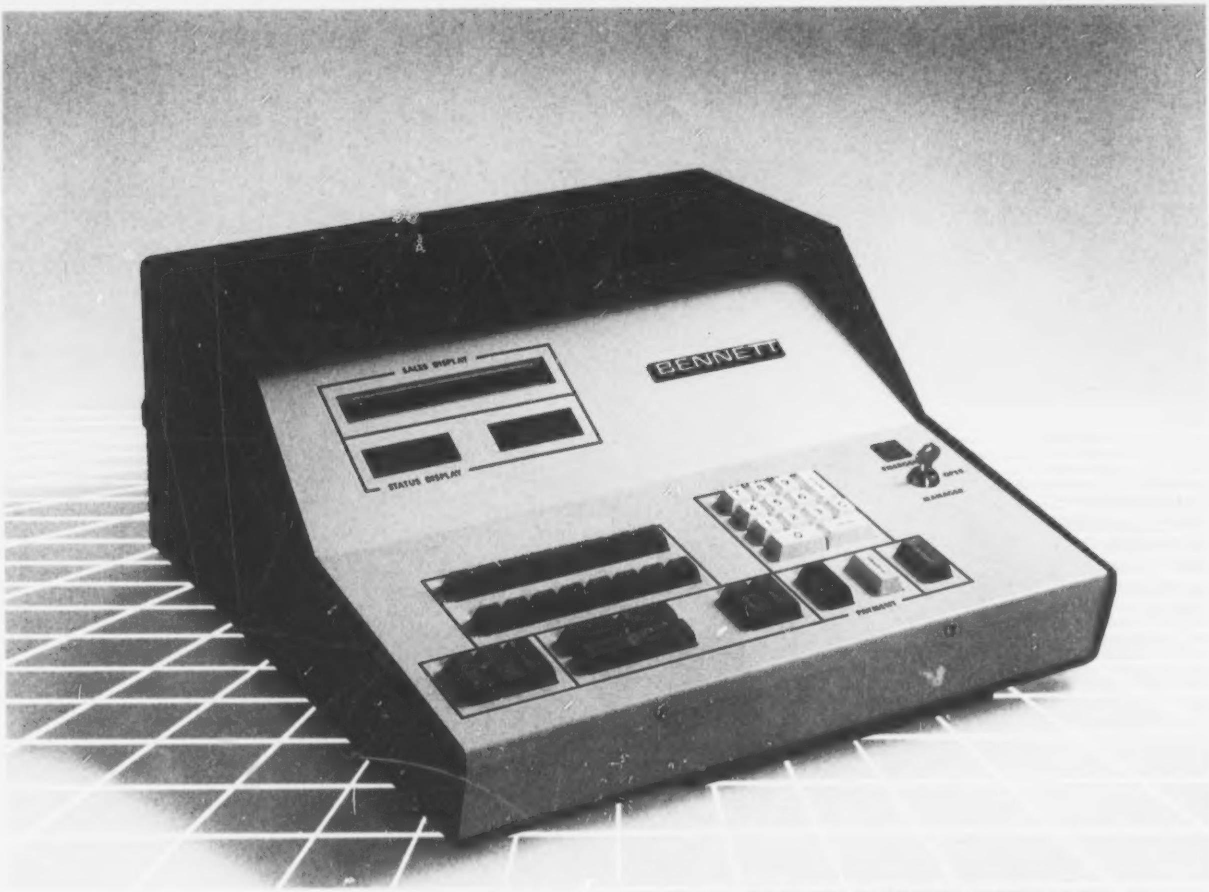
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—

(E) Purchased by Stormy Oil Co.

Source: NPN questionnaires and 1983 Factbook



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- Plug-in Peripheral Cards
- Prepay/Postpay Combination Mode
- Four Shift Totals (current shift plus three shifts)
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Muskegon, MI 49444

Average Number of Employees

(As of Jan. 1, 1983)

	Mining	Manufacturing		Transportation		Wholesale	Retail	
	Crude Oil and Natural Gas Extraction	Petroleum Refining	Lubricating Oils and Greases	Pipelines (Except Natural Gas)	Gas Production and Distribution	Petroleum and Petroleum Products	Gasoline Service Stations	Total
Alabama	1,954	420	31	101	3,052	4,396	7,257	17,211
Alaska	7,772	167	0	1,237	291	397	1,122	10,986
Arizona	217	103	0	97	992	1,478	7,195	10,082
Arkansas	4,240	796	N.D.	331	2,446	2,597	4,300	14,710
California	40,416	28,181	883	1,071	10,462	15,792	59,447	156,252
Colorado	29,300	600	39	170	2,543	3,253	8,970	44,875
Connecticut	200	410	80	N.D.	1,310	2,910	8,920	13,830
Delaware	30	1,054	10	1	378	509	1,427	3,409
Florida	1,103	84	189	64	2,278	7,086	28,271	39,075
Georgia	139	103	125	510	3,510	6,091	14,764	25,242
Hawaii	N.D.	408	0	0	359	476	3,402	4,645
Idaho	203	2	0	15	479	1,542	2,076	4,317
Illinois	7,300	7,400	800	1,050	9,400	12,000	23,000	60,950
Indiana	923	3,036	307	474	4,556	4,301	14,584	28,181
Iowa	15	0	52	177	1,188	2,951	11,139	15,522
Kansas	17,108	4,017	N.D.	2,125	4,789	2,667	7,364	38,070
Kentucky	3,554	3,507	7	160	3,035	3,114	9,096	22,573
Louisiana	95,300	12,600	N.A.	1,000	7,000	6,700	8,600	131,200
Maine	20	0	0	N.D.	N.D.	1,246	2,461	3,727
Maryland	36	0	197	0	0	3,346	12,540	16,119
Massachusetts	216	1,076	1,317	40	4,917	3,708	13,961	25,235
Michigan	4,600	2,000	400	200	8,300	5,200	20,400	41,100
Minnesota	366	910	N.D.	192	2,519	2,827	14,552	21,366
Mississippi	10,999	1,512	87	168	2,253	3,383	4,624	23,026
Missouri	215	N.D.	2,295	255	5,061	7,368	13,976	29,170
Montana	5,482	1,060	0	97	117	1,776	2,291	10,823
Nebraska	1,037	31	167	106	3,783	1,717	6,008	12,849
Nevada	575	48	2	22	552	554	3,342	5,095
New Hampshire	1	0	1	3	316	552	2,411	3,284
New Jersey	93	9,018	945	160	2,042	4,755	18,659	35,672
New Mexico	15,431	1,051	22	297	3,853	1,863	4,003	26,520
New York	2,484	10,967	388	131	7,143	13,755	28,645	63,513
North Carolina	8	0	169	115	2,504	6,979	9,659	19,434
North Dakota	7,857	263	0	168	263	2,438	2,164	13,153
Ohio	12,548	5,847	654	696	7,867	6,436	28,622	62,670
Oklahoma	102,227	8,138	302	2,676	5,686	7,617	6,608	133,254
Oregon	122	0	4	0	1,463	2,178	7,395	11,162
Pennsylvania	5,500	13,000	1,400	700	9,100	11,300	27,400	68,400
Rhode Island	114	0	N.D.	0	877	601	2,262	3,854
South Carolina	12	N.D.	N.D.	N.D.	612	3,528	6,449	10,601
South Dakota	160	2	0	61	140	1,468	2,620	4,451
Tennessee	895	70	46	45	2,103	4,403	11,688	19,250
Texas	292,522	41,429	931	5,565	30,161	26,629	35,933	433,170
Utah	5,401	875	N.D.	105	2,961	1,970	4,129	15,441
Vermont	N.D.	0	N.D.	0	132	320	1,685	2,137
Virginia	300	200	0	100	2,600	7,600	13,900	24,700
Washington	228	1,611	N.D.	87	1,560	3,146	9,188	15,820
West Virginia	6,083	530	70	133	5,541	2,062	3,853	18,272
Wisconsin	19	148	126	151	2,945	4,928	12,032	20,349
Wyoming	21,030	1,611	2	447	1,013	1,152	2,990	28,245
Dist. of Columbia	35	139	0	0	732	329	1,078	2,313
Total	706,390	164,524	12,048	21,303	177,184	225,394	558,462	1,865,305

N.D.—Non-Disclosure. N.A.—Not Available.
Source—Independent Petroleum Assn. of America. The Oil Industry in Your State. 1983.

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How Distillates Were Used in 1982

(Add 000 bbl.)

Use	1982	1981	% Change	% Share of Total Distillate Use in 1982	% Share of Total Distillate Use in 1981
Residential	180,760	197,400	(8.4%)	18.5%	19.1%
Commercial	75,699	78,663	(3.8)	7.8	7.6
Industrial	71,340	80,216	(11.1)	7.3	7.8
Farm	68,453	69,665	(1.7)	7.0	7.1
Sub-total(a)	396,252	425,994	(7.0)	40.6	41.3
Oil Company	29,482	29,185	1.0	3.0	2.3
Elec. Utils	12,134	18,192	(33.3)	1.2	3.1
Railroads	93,150	100,482	(7.3)	9.6	9.7
Vessels	33,885	41,025	(17.4)	3.5	3.4
Highway diesel	338,006	340,002	(0.6)	34.7	31.3
Military	15,201	17,763	(14.4)	1.6	1.7
Off-highway diesel	37,118	38,851	(4.5)	3.8	3.8
All other	19,639	21,032	(6.6)	2.0	2.0
U.S. total	**974,864**	**1,032,476**	**(5.6)**	—	—

(a) For a general consideration, the sum of the residential, commercial, industrial and farm is roughly comparable to the old "heating" category, which was discontinued in 1979.
Source: Deliveries of Fuel Oil and Kerosine in 1982, Petroleum Supply Annual, Energy Information Administration, June 1983.

How Residual Was Used in 1982

(Add 000 bbl.)

Use	1982	1981	% Change	% Share of Total Residual Use in 1982	% Share of Total Residual Use in 1981
Commercial	65,781	67,035	(1.9%)	10.5%	8.8%
Industrial	122,619	117,024	4.8	19.6	15.4
Sub-total(a)	188,400	184,059	2.4	30.1	24.2
Oil Company	45,319	51,870	(12.6)	7.2	6.8
Elec. Util	227,419	325,486	(30.1)	36.3	42.7
Railroad	170	178	(4.5)	—	—
Vessels	152,586	188,632	(19.1)	24.4	24.8
Military	7,829	7,008	11.7	1.2	0.9
All other	4,784	4,795	—	0.8	0.6
U.S. total	**626,510**	**762,030**	**(17.8)**	—	—

(a) Separate space-heating category no longer exists. The sum of the commercial and industrial categories roughly approximates the heating category prior to 1979.
Source: Deliveries of Fuel Oil and Kerosine in 1982, Petroleum Supply Annual, Energy Information Administration, June 1983.

How Kerosine Was Used in 1982

(Add 000 bbl.)

Use	1982	1981	% Change	% Share of Total Kerosine Use in 1982	% Share of Total Kerosine Use in 1981
Residential	16,769	15,052	11.4%	35.7%	32.5%
Commercial	5,347	12,229	(56.3)	11.4	26.4
Industrial	6,480	3,871	67.4	13.8	8.4
Sub-total(a)	28,596	31,152	(8.2)	60.1	67.3
Farm	1,346	1,591	(15.4)	2.3	3.4
All other	17,016	13,563	25.5	36.2	29.3
U.S. total	**46,963**	**46,306**	**1.4**	—	—

(a) Separate heating category no longer exists. The sum of the residential, commercial and industrial roughly approximates the heating category prior to 1979.
Source: Deliveries of Fuel Oil and Kerosine in 1982, Petroleum Supply Annual, Energy Information Administration, June 1983.

How New Homes Are Heated

Fuel oil did surprisingly well in the Northeast and the North Central in 1982, the most recent years for which data is available. Fuel oil got 18% of new homes in 1982, up 5% from 1981, and 3% in the North Central, up from literally zero in 1981. It also increased its nationwide growth by 1%—from 2% in 1981 to 3% in 1982.

Region	New Homes Completed (Add 000)	Share of New Homes by Fuels and percentages			
		Gas	Electric	Oil	Other
Northeast	79	33%	34%	18%	13%
North Central	92	58	26	3	14
South	340	33	63	—	4
West	121	[illegible]	[illegible]	—	10
Total 1982	**632**	**40%**	**50%**	**3%**	**8%**
Total 1981	**819**	**41%**	**50%**	**2%**	**7%**

Source: U.S. Department of Commerce, Construction Reports 25-82-1, July 1983.

Gas: Who Uses It for Heat

Gas added another 622,000 customers in 1982, but its rate of increase plummeted for the second year in a row. In new homes, it was down 18.1% from 1981; in conversions, it was down a hefty 103%; and in the total of new customers, down a spanking 31.8%.

	% of Gas-Heated Homes to Total Gas-Using Homes	Consumers Added in 1982 (Add 000)		
		New Homes	Existing Homes	Total Added
New England	66.8%	7.2	18.1	25.3
Mid-Atlantic	62.5	25.3	83.8	109.1
East North Central	93.8	41.6	57.6	99.2
West North Central	97.3	25.8	11.9	37.7
South Atlantic	90.9	53.4	54.8	108.2
East South Atlantic	98.3	11.2	3.3	14.5
West South Atlantic	95.9	71.6	1.5	73.1
Mountain	98.8	40.8	2.4	42.8
Pacific	93.4	100.5	11.8	112.3
Total	**88.2**	**377.4**	**244.8**	**622.2**
% Change 82 vs 81		18.1%	103%	31.8%

Source: American Gas Assn., Home Heating Survey, 1982.

Gas Heat Equipment Shipments

After so many bad years, things took an upturn for shipments of central heating furnaces and boilers for gas-fired equipment in 1983, according to the Gas Appliance Manufacturers Assn. Furnaces were up 15% and boilers 44%. Wall furnaces and recreational vehicle systems also rebounded significantly. Unit and duct heaters were the only weak points all year, GAMA said.

Class and Type of Equipment	1983	1982	% Change
Central Heating:			
Furnaces	1,572,700	1,367,500	+15.0%
Boilers	1,661,765	1,155,600	+43.8
Space Heating:			
Wall Furnaces Vented	168,310	132,640	+26.9
RV Systems	176,103	109,350	+61.0
Unit Heaters	122,020	126,600	3.6
Duct Heaters	16,912	17,200	1.7

Source: Gas Appliance Manufacturers Assn.

Distillate Sales in 1982 . . .

(Add 000 bbl.)

	Residential		Commercial		Industrial		Oil Company	
Destination	1982	1981	1982	1981	1982	1981	1982	1981
PAD District 1								
New England States								
Connecticut	12,277	12,979	2,983	2,940	1,092	958	32	51
Maine	4,956	5,234	1,421	1,745	444	326	13	58
Massachusetts	18,139	18,747	5,525	5,773	1,569	1,526	38	45
New Hampshire	3,232	3,485	593	534	260	379	8	17
Rhode Island	2,473	2,573	434	382	194	208	11	8
Vermont	1,399	2,013	508	555	134	131	5	10
Central Atlantic States								
Delaware	897	1,031	415	634	96	161	39	36
District of Columbia	510	282	451	281	5	78	2	2
Maryland	6,184	6,805	1,775	1,572	1,206	1,486	56	166
New Jersey	19,349	23,217	7,051	7,680	6,387	7,635	121	680
New York	31,753	35,129	13,638	12,628	3,816	3,629	291	247
Pennsylvania	20,763	24,260	4,735	5,172	5,030	5,466	283	728
Lower Atlantic States								
Florida	726	985	652	2,578	1,341	1,937	218	380
Georgia	163	184	1,044	1,230	908	1,158	149	53
North Carolina	4,924	5,529	888	1,346	1,145	1,611	47	82
South Carolina	1,136	1,432	405	434	486	583	61	64
Virginia	5,050	5,585	1,487	1,399	1,228	1,570	1,463	906
West Virginia	866	894	303	712	1,567	1,734	168	173
Total	**134,797**	**150,364**	**44,308**	**47,595**	**26,908**	**30,576**	**3,005**	**3,706**
PAD District 2								
Illinois	2,675	2,624	3,139	4,070	2,854	2,186	549	487
Indiana	4,234	4,110	1,445	1,142	2,343	2,447	155	175
Iowa	2,116	2,016	649	624	603	613	22	25
Kansas	174	19	146	297	895	354	653	850
Kentucky	649	573	492	603	2,926	3,346	170	78
Michigan	6,331	7,913	2,137	2,373	1,456	1,564	105	108
Minnesota	6,224	4,829	991	837	819	1,086	93	83
Missouri	1,128	1,410	1,051	775	833	1,249	87	184
Nebraska	367	386	299	340	213	183	30	33
North Dakota	915	1,068	211	393	288	450	468	486
Ohio	4,501	5,710	2,110	2,603	3,561	5,221	313	366
Oklahoma	1	96	157	525	1,125	926	1,651	2,082
South Dakota	876	702	285	251	107	94	17	67
Tennessee	404	472	1,118	1,121	1,329	1,399	94	123
Wisconsin	7,587	7,508	1,282	1,155	656	916	38	45
Total	38,182	39,436	15,512	17,109	20,008	22,034	4,445	5,192
PAD District 3								
Alabama	55	17	238	998	1,686	1,746	73	59
Arkansas	14	20	139	176	488	628	99	192
Louisiana	84	0	348	518	3,512	3,595	6,936	6,057
Mississippi	0	2	114	138	663	1,964	1,161	355
New Mexico	24	18	560	683	617	886	219	352
Texas	29	7	4,894	3,749	4,128	4,841	8,080	8,160
Total	**206**	**64**	**6,293**	**6,262**	**11,094**	**13,660**	**16,568**	**15,175**
PAD District 4								
Colorado	58	54	151	312	644	946	100	139
Idaho	277	424	470	122	425	428	3	9
Montana	353	274	184	381	271	380	101	312
Utah	125	73	383	206	767	823	271	514
Wyoming	30	26	352	125	1,585	2,129	3,008	2,314
Total	843	851	1,540	1,146	3,692	4,706	3,483	3,288
PAD District 5								
Alaska	1,128	912	482	533	726	722	5	6
Arizona	0	1	23	60	1,050	1,679	1	4
California	72	72	4,410	3,742	4,794	3,898	1,696	887
Hawaii	0	1	55	178	83	107	219	163
Nevada	158	151	77	333	234	283	5	4
Oregon	2,117	2,541	1,003	959	1,399	1,466	25	255
Washington	3,257	3,007	1,996	746	1,352	1,085	30	505
Total	**6,732**	**6,685**	**8,046**	**6,551**	**9,638**	**9,240**	**1,981**	**1,824**
U.S. Total	180,760	197,400	75,699	78,663	71,340	80,216	29,482	29,185

. . . By Categories and Uses

(Add 000 bbl.)

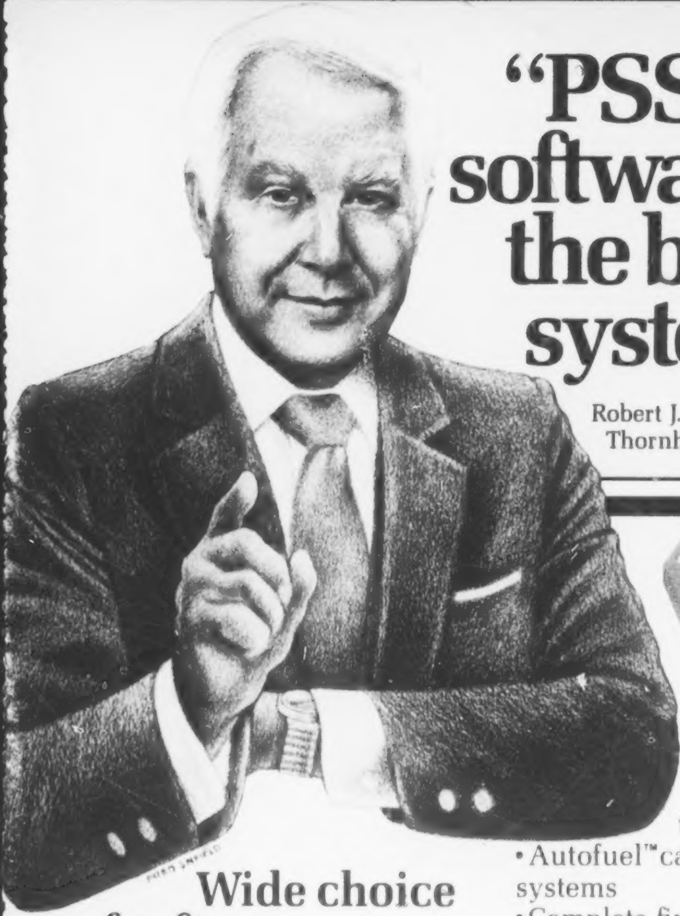
Destination	Electric Utility		Farm		Military		Railroad		Vessel Bunkering	
	1982	1981	1982	1981	1982	1981	1982	1981	1982	1981
PAD District 1										
New England States										
Connecticut	17	31	85	53	982	0	6	25	17	7
Maine	54	36	114	78	57	49	131	122	88	85
Massachusetts	672	325	68	71	657	294	241	148	177	121
New Hampshire	12	15	41	50	1	4	1	2	11	9
Rhode Island	18	19	11	17	4	23	21	47	31	37
Vermont	16	17	93	92	0	0	6	15	5	6
Central Atlantic States										
Delaware	74	120	127	97	0	49	27	21	5	9
District of Columbia	247	713	0	0	311	58	72	17	0	0
Maryland	589	531	349	416	301	426	486	622	497	579
New Jersey	283	949	128	226	104	142	517	291	1,724	1,496
New York	954	897	973	923	233	228	928	1,208	626	802
Pennsylvania	1,410	1,686	989	1,057	84	163	1,522	2,959	309	321
Lower Atlantic States										
Florida	367	2,088	583	744	78	60	1,662	1,748	2,965	4,574
Georgia	219	439	729	715	87	272	2,119	1,909	580	389
North Carolina	277	433	1,527	1,004	41	94	985	916	100	87
South Carolina	145	499	561	661	54	130	442	384	93	192
Virginia	291	574	450	351	261	440	2,141	2,195	586	630
West Virginia	455	810	108	79	0	2	1,206	1,487	158	189
Total	**6,100**	**10,182**	**6,936**	**6,634**	**3,255**	**2,434**	**12,513**	**14,116**	**7,972**	**9,533**
PAD District 2										
Illinois	386	387	3,254	2,965	25	21	4,751	5,230	94	149
Indiana	504	693	2,428	2,175	27	81	3,422	3,385	101	110
Iowa	63	2	3,455	3,305	38	46	2,184	1,007	35	25
Kansas	228	62	2,024	1,986	18	36	4,205	3,810	0	1
Kentucky	270	306	673	611	20	30	2,662	3,232	2,735	2,202
Michigan	317	604	2,264	3,003	141	323	1,222	1,784	52	70
Minnesota	8	52	3,935	3,467	20	9	1,742	1,524	239	323
Missouri	116	45	3,885	2,987	29	43	2,699	1,375	691	674
Nebraska	28	93	2,888	2,646	9	5	1,025	896	0	0
North Dakota	78	91	1,790	1,852	172	6	925	1,135	50	0
Ohio	474	572	1,701	1,842	10	49	5,097	6,869	33	99
Oklahoma	59	32	668	884	0	0	1,443	1,659	0	0
South Dakota	92	35	1,441	1,331	26	21	212	90	0	0
Tennessee	184	243	772	797	8	9	2,796	2,921	1,396	1,940
Wisconsin	223	60	2,102	2,121	12	28	971	1,014	88	168
Total	3,030	3,277	33,280	31,972	555	707	35,356	35,931	5,466	5,761
PAD District 3										
Alabama	33	49	803	1,103	9	40	3,225	4,064	1,242	1,434
Arkansas	217	15	2,988	2,905	6	16	2,751	2,698	146	110
Louisiana	288	1,387	1,821	2,081	227	1,557	2,639	3,193	4,724	6,702
Mississippi	44	93	1,660	2,277	5	70	880	1,037	657	447
New Mexico	112	150	238	335	16	49	2,096	2,256	0	0
Texas	685	380	6,315	8,331	3,344	2,171	12,834	12,916	8,342	10,965
Total	**1,379**	**2,074**	**13,825**	**17,032**	**3,607**	**3,903**	**24,425**	**26,164**	**15,111**	**19,658**
PAD District 4										
Colorado	68	83	1,269	1,089	50	95	1,882	1,655	0	0
Idaho	0	0	719	1,009	19	85	570	610	0	0
Montana	0	40	839	908	2	4	1,402	1,455	0	0
Utah	27	59	235	156	2	0	1,239	1,743	0	0
Wyoming	8	136	271	312	1	4	2,810	3,963	0	0
Total	103	318	3,333	3,474	74	188	7,903	9,426	0	0
PAD District 5										
Alaska	592	544	14	21	220	357	36	116	854	955
Arizona	75	24	617	837	11	3	1,232	1,329	0	0
California	190	865	8,293	7,450	5,232	6,155	7,138	7,894	1,860	2,566
Hawaii	618	789	408	450	2,102	3,193	15	10	65	66
Nevada	20	14	79	120	14	12	731	580	0	0
Oregon	16	36	595	705	21	15	2,616	3,227	977	761
Washington	11	69	1,073	970	110	796	1,185	1,689	1,580	1,725
Total	**1,522**	**2,341**	**11,079**	**10,553**	**7,710**	**10,531**	**12,953**	**14,845**	**5,336**	**6,073**
U.S. Total	12,134	18,192	68,453	69,665	15,201	17,763	93,150	100,482	33,885	41,025

Distillate Sales in 1982 (Continued)

(Add 000 bbl.)

Destination	On-Highway		Off-Highway		All Other		Total	
	1982	1981	1982	1981	1982	1981	1982	1981
PAD District 1								
New England States								
Connecticut	2,698	2,262	251	380	69	59	20,509	19,745
Maine	1,564	1,248	243	176	104	109	9,189	9,266
Massachusetts	4,745	4,419	309	282	123	404	32,263	32,155
New Hampshire	744	692	170	113	11	13	5,084	5,313
Rhode Island	679	590	38	25	70	64	3,984	3,993
Vermont	352	753	173	222	16	14	2,707	3,828
Central Atlantic States								
Delaware	921	862	134	78	18	35	2,753	3,133
District of Columbia	436	376	9	10	172	308	2,215	2,125
Maryland	4,023	4,730	326	571	406	461	16,198	18,365
New Jersey	8,093	7,460	519	562	1,270	635	45,546	50,973
New York	8,353	7,227	619	774	424	571	62,608	64,263
Pennsylvania	15,296	15,311	2,136	2,476	508	378	53,065	59,977
Lower Atlantic States								
Florida	13,098	12,968	310	630	503	1,124	22,503	29,816
Georgia	11,801	12,067	191	171	397	801	18,387	19,388
North Carolina	9,789	9,526	296	370	165	230	20,184	21,228
South Carolina	5,682	4,968	197	193	200	301	9,462	9,841
Virginia	8,286	9,038	572	574	128	376	21,943	23,636
West Virginia	2,381	2,833	248	327	199	210	7,659	9,450
Total	**98,941**	**97,330**	**6,741**	**7,934**	**4,783**	**6,093**	**356,254**	**386,497**
PAD District 2								
Illinois	13,744	15,037	842	826	208	445	32,521	34,427
Indiana	13,821	13,599	393	575	40	469	28,913	28,961
Iowa	6,525	6,334	479	314	43	63	16,212	14,374
Kansas	5,100	5,468	269	331	105	25	13,817	13,239
Kentucky	5,747	5,911	844	947	319	378	17,507	18,217
Michigan	8,181	8,230	362	481	251	204	22,819	26,657
Minnesota	6,341	5,957	428	499	40	48	20,880	18,714
Missouri	9,004	8,460	1,198	732	17	69	20,738	18,003
Nebraska	4,086	3,438	224	199	7	14	9,176	8,233
North Dakota	2,084	2,035	259	190	19	2	7,209	7,708
Ohio	17,092	16,663	3,283	3,195	2,075	1,770	40,250	44,959
Oklahoma	8,251	8,143	811	1,095	391	77	14,557	15,519
South Dakota	1,900	1,714	102	97	73	4	5,131	4,406
Tennessee	9,505	9,112	321	417	835	958	18,764	19,512
Wisconsin	7,072	7,230	461	442	45	39	20,537	20,726
Total	118,453	117,331	10,276	10,340	4,468	4,565	289,033	293,655
PAD District 3								
Alabama	6,758	6,782	703	919	611	728	15,436	17,939
Arkansas	5,512	5,458	877	733	99	165	13,336	13,116
Louisiana	7,510	10,031	2,559	2,068	210	775	30,858	37,964
Mississippi	5,257	5,298	693	991	715	815	11,849	13,487
New Mexico	3,512	5,648	489	1,733	71	216	7,954	12,526
Texas	32,692	31,564	7,184	5,465	1,653	1,810	90,180	90,359
Total	**61,241**	**64,981**	**12,505**	**11,909**	**3,359**	**4,509**	**169,613**	**185,391**
PAD District 4								
Colorado	4,211	3,458	595	655	104	148	9,132	8,634
Idaho	1,718	1,331	233	639	62	118	4,496	4,775
Montana	2,473	2,384	153	184	36	164	5,814	6,486
Utah	2,550	2,760	536	527	290	254	6,425	7,115
Wyoming	2,253	2,271	578	883	119	289	11,015	12,452
Total	13,205	12,204	2,095	2,888	611	973	36,884	39,462
PAD District 5								
Alaska	596	1,067	424	269	1,258	1,046	6,335	6,548
Arizona	4,581	5,323	276	379	236	102	8,102	9,741
California	27,679	28,423	3,026	2,960	2,947	2,582	67,337	67,494
Hawaii	415	423	154	235	436	428	4,570	6,043
Nevada	1,977	1,813	177	158	46	20	3,518	3,488
Oregon	5,339	5,651	343	599	569	247	15,020	16,462
Washington	5,579	5,456	1,101	1,180	926	467	18,200	17,695
Total	**46,166**	**48,156**	**5,501**	**5,780**	**6,418**	**4,892**	**123,081**	**127,470**
U.S. Total	338,006	340,002	37,118	38,851	19,639	21,032	974,864	1,032,476

Source: Energy Information Administrations, Petroleum Supply Annual, June 1983.



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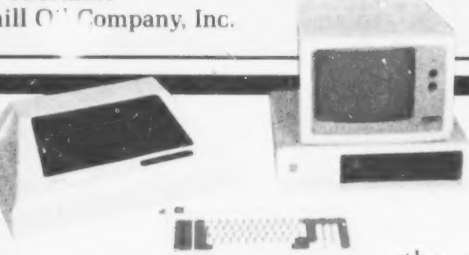

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Kerosine Sales in 1982

(Add 000 bbl.)

	Residential		Commercial		Industrial		Farm		All Other		Total	
Destination	**1982**	**1981**	**1982**	**1981**	**1982**	**1981**	**1982**	**1981**	**1982**	**1981**	**1982**	**1981**
PAD District 1												
New England States												
Connecticut	263	195	1	11	2	6	0	0	115	203	381	415
Maine	272	233	22	45	4	1	4	1	14	10	316	290
Massachusetts	510	181	28	9	13	13	1	1	216	226	768	430
New Hampshire	234	206	8	4	0	0	1	0	5	5	246	215
Rhode Island	123	47	2	1	0	2	0	0	0	4	125	54
Vermont	154	177	26	26	0	0	5	8	2	1	187	212
Central Atlantic States												
Delaware	324	256	12	8	1	0	2	2	1	1	340	267
District of Columbia	4	2	1	1	1	1	0	0	0	69	6	73
Maryland	664	614	88	16	19	15	9	7	25	227	805	879
New Jersey	353	193	96	57	140	80	0	0	817	1,131	1,406	1,461
New York	1,836	1,509	199	158	131	82	23	19	372	304	2,561	2,072
Pennsylvania	2,194	1,992	236	183	331	118	25	44	140	314	2,932	2,651
Lower Atlantic States												
Florida	227	574	221	64	4	7	12	2	562	101	1,026	748
Georgia	62	34	143	18	2	10	12	1	94	209	313	272
North Carolina	2,025	1,939	33	45	36	34	175	208	63	130	2,332	2,356
South Carolina	526	553	25	29	11	21	14	46	29	30	605	679
Virginia	1,048	919	34	37	70	68	53	65	63	83	1,268	1,172
West Virginia	312	275	16	16	81	47	1	0	33	24	443	362
Total	**11,131**	**9,899**	**1,191**	**728**	**846**	**505**	**337**	**404**	**2,557**	**3,072**	**16,060**	**14,608**
PAD District 2												
Illinois	335	149	7	14	50	249	18	34	29	220	439	666
Indiana	343	537	18	9	119	82	61	67	50	14	591	709
Iowa	299	235	36	14	14	10	61	101	40	14	450	374
Kansas	18	10	7	5	25	43	7	24	169	158	226	240
Kentucky	527	474	83	125	119	110	47	86	364	369	1,140	1,164
Michigan	559	206	18	19	72	82	18	9	76	676	743	992
Minnesota	191	115	4	5	0	0	32	29	4	0	231	149
Missouri	123	76	584	398	11	14	40	53	22	5	780	546
Nebraska	29	29	14	10	14	14	32	24	4	10	93	87
North Dakota	22	14	4	0	0	0	0	0	0	0	26	14
Ohio	912	1,016	61	67	191	331	47	76	1,352	1,261	2,563	2,751
Oklahoma	14	15	242	38	50	43	18	91	137	115	461	302
South Dakota	22	14	11	0	0	0	4	10	0	0	37	24
Tennessee	541	901	133	72	14	67	0	0	411	484	1,099	1,524
Wisconsin	79	72	130	5	25	29	4	9	4	10	242	125
Total	**4,014**	**3,863**	**1,352**	**781**	**704**	**1,074**	**389**	**613**	**2,662**	**3,336**	**9,124**	**9,667**
PAD District 3												
Alabama	534	165	331	57	204	43	25	0	636	241	1,730	526
Arkansas	51	42	76	57	204	185	25	28	153	43	509	355
Louisiana	76	28	331	2,530	1,501	910	280	185	3,562	3,212	5,750	6,865
Mississippi	51	29	127	14	102	14	25	0	25	43	330	100
New Mexico	178	85	153	526	76	28	0	0	178	128	585	767
Texas	356	114	1,298	6,808	1,425	810	153	256	6,895	2,757	10,127	10,745
Total	**1,246**	**483**	**2,316**	**9,992**	**3,512**	**1,990**	**508**	**469**	**11,449**	**6,424**	**19,031**	**19,358**
PAD District 4												
Colorado	170	60	23	9	8	0	46	43	15	103	262	215
Idaho	0	0	8	0	15	8	0	0	8	9	31	17
Montana	0	0	0	0	0	0	0	9	0	17	0	26
Utah	46	26	6	60	23	9	0	0	77	60	192	155
Wyoming	0	8	[illegible]	0	8	0	0	0	116	61	139	69
Total	**216**	**94**	**92**	**69**	**54**	**17**	**46**	**52**	**216**	**250**	**627**	**482**
PAD District 5												
Alaska	0	0	24	0	1,220	0	0	0	18	36	1,262	36
Arizona	0	0	12	18	0	89	0	0	6	0	18	107
California	18	71	324	552	66	107	60	53	66	303	534	1,086
Hawaii	0	0	0	0	0	0	0	0	0	0	0	0
Nevada	12	36	6	18	0	0	0	0	0	18	18	72
Oregon	60	71	12	53	0	0	6	0	18	18	96	142
Washington	72	535	18	18	78	89	0	0	24	106	192	748
Total	**162**	**713**	**396**	**659**	**1,364**	**285**	**66**	**53**	**132**	**481**	**2,121**	**2,191**
United States Total	**16,769**	**15,052**	**5,347**	**12,229**	**6,480**	**3,871**	**1,346**	**1,591**	**17,016**	**13,563**	**46,963**	**46,306**

Source: Energy Information Administration, Petroleum Supply Annual, June 1983

BURLINGTON TOWN HALL

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Tech Weld dual-equipment aluminum tank delivers better on the bottom line.

More and more inquiries are coming to us from operators about the advantages of a Tech Weld combo aluminum tank. Not surprising. Our dual equipment combo, for instance, weighs less than a comparable steel tank so its payload on every delivery is greater. And the very fact it is of aluminum construction means there's no rusting to shorten its life span.

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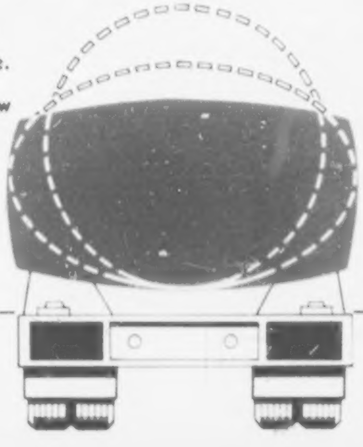

The Tech Weld profile. Ordinary tanks are superimposed to show our lower center of gravity.

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Residual Fuel Oil Sales in 1982 . . .

(Add 000 bbl.)

	Commercial		Industrial		Oil Company		Electric Utility		Military	
Destination	1982	1981	1982	1981	1982	1981	1982	1981	1982	1981
PAD District 1										
New England States										
Connecticut	790	796	3,082	2,435	39	35	17,282	18,598	0	0
Maine	665	364	11,440	5,290	0	0	3,034	3,774	32	0
Massachusetts	4,386	3,180	5,154	3,925	2	74	31,130	40,654	968	98
New Hampshire	650	474	611	421	0	0	2,815	3,891	2	0
Rhode Island	233	192	643	734	0	0	896	1,241	7	0
Vermont	119	155	253	192	0	0	0	0	0	0
Central Atlantic States										
Delaware	1,261	1,980	1,058	1,225	0	0	3,362	4,989	73	0
District of Columbia	114	79	1	1	0	0	0	110	1,371	182
Maryland	469	210	1,280	1,454	13	99	5,645	5,759	1,510	63
New Jersey	4,797	6,468	4,387	5,099	4,280	4,192	7,959	10,085	98	126
New York	19,482	13,900	10,347	7,549	112	221	56,114	64,047	714	932
Pennsylvania	1,148	1,606	5,602	5,263	2,546	2,278	9,458	15,650	10	1,085
Lower Atlantic States										
Florida	397	825	4,511	5,798	7	2,012	52,155	74,640	54	119
Georgia	5	9	3,083	3,156	16	16	57	388	90	49
North Carolina	192	103	5,525	5,141	3	7	0	0	32	133
South Carolina	28	102	2,085	2,555	4	43	6	1,357	46	49
Virginia	537	384	2,805	2,608	53	66	2,974	5,681	428	293
West Virginia	3	2	1,127	726	313	273	0	0	0	0
Total	**35,276**	**30,829**	**62,994**	**53,572**	**7,380**	**9,316**	**192,887**	**250,864**	**5,435**	**3,129**
PAD District 2										
Illinois	1,071	1,260	2,127	4,922	5,273	5,033	6,897	10,083	22	0
Indiana	92	79	1,689	4,511	3,045	2,846	0	0	0	98
Iowa	29	28	292	58	0	0	0	7	0	7
Kansas	3	0	486	363	271	319	233	14	0	0
Kentucky	4	18	707	651	476	229	0	0	10	252
Michigan	225	114	1,795	1,555	824	350	1,304	6,490	0	217
Minnesota	179	19	1,218	954	231	196	17	0	0	0
Missouri	32	29	271	337	310	262	123	0	115	6
Nebraska	105	17	93	37	0	0	0	0	0	0
North Dakota	216	61	301	812	312	256	0	0	325	0
Ohio	185	28	1,494	4,023	440	954	100	234	0	14
Oklahoma	0	0	44	108	583	637	0	0	0	0
South Dakota	13	14	32	132	0	0	0	2	0	0
Tennessee	106	77	583	1,033	24	28	0	0	0	0
Wisconsin	39	12	1,978	640	143	109	0	10	0	0
Total	**2,299**	**1,756**	**13,110**	**20,136**	**11,932**	**11,219**	**8,674**	**16,840**	**472**	**594**
PAD District 3										
Alabama	166	0	3,738	2,458	46	20	0	0	0	0
Arkansas	146	150	1,547	1,759	0	0	108	540	0	0
Louisiana	17,247	15,529	8,058	10,601	1,998	2,608	1,118	2,825	0	37
Mississippi	29	2,774	2,242	773	514	776	284	2,035	0	0
New Mexico	0	0	646	791	0	0	68	47	0	0
Texas	1,884	2,550	18,215	13,377	9,625	15,035	795	1,284	144	407
Total	**19,472**	**21,003**	**34,446**	**29,759**	**12,183**	**18,439**	**2,373**	**6,731**	**144**	**444**
PAD District 4										
Colorado	5	3	7	125	0	0	0	32	0	0
Idaho	18	29	205	26	0	0	0	0	0	0
Montana	5	0	300	462	1,349	1,996	0	0	0	0
Utah	39	0	337	908	487	72	0	52	0	0
Wyoming	182	5	332	151	1,102	1,622	0	0	0	0
Total	**249**	**37**	**1,181**	**1,672**	**2,938**	**3,590**	**0**	**84**	**0**	**0**
PAD District 5										
Alaska	3	0	0	1	0	0	298	222	0	7
Arizona	164	36	16	21	0	0	117	170	0	0
California	5,697	11,529	973	4,275	7,141	6,432	13,087	39,919	812	933
Hawaii	110	55	254	290	1,627	782	9,897	10,471	240	127
Nevada	11	25	22	40	0	0	86	185	0	0
Oregon	1,544	995	3,422	1,666	157	99	0	0	220	0
Washington	956	770	6,201	5,592	1,953	1,893	0	0	506	1,774
Total	**8,485**	**13,410**	**10,888**	**11,885**	**10,878**	**9,206**	**23,485**	**50,967**	**1,778**	**2,841**
U.S. Total	**65,781**	**67,035**	**122,619**	**117,024**	**45,319**	**51,870**	**227,419**	**325,486**	**7,829**	**7,008**

. . . By Categories and Uses

(Add 000 bbl.)

Destination	Railroad 1982	Railroad 1981	Vessel Bunkering 1982	Vessel Bunkering 1981	All Other 1982	All Other 1981	Total 1982	Total 1981
PAD District 1								
New England States								
Connecticut	0	0	6	4	150	83	21,349	21,951
Maine	10	6	620	634	2	22	15,803	10,090
Massachusetts	0	0	546	975	576	767	42,762	49,673
New Hampshire	0	0	28	49	0	0	4,106	4,835
Rhode Island	0	0	12	49	0	11	1,791	2,227
Vermont	0	0	0	0	0	4	372	351
Central Atlantic States								
Delaware	0	0	136	292	399	185	6,289	8,671
District of Columbia	0	0	0	0	41	17	1,527	389
Maryland	0	0	2,831	4,729	150	82	11,898	12,396
New Jersey	0	0	12,029	12,287	691	22	34,241	38,279
New York	0	0	10,922	10,922	108	297	97,868	97,868
Pennsylvania	0	0	1,675	4,144	350	314	20,789	30,340
Lower Atlantic States								
Florida	0	0	5,864	6,777	91	176	63,079	90,347
Georgia	0	0	2,311	2,633	0	0	5,562	6,251
North Carolina	0	0	217	292	2	1	5,971	5,677
South Carolina	4	4	792	1,024	0	8	2,965	5,142
Virginia	36	2	2,708	3,949	50	89	9,591	13,072
West Virginia	0	0	0	0	0	0	1,443	1,001
Total	**50**	**12**	**32,971**	**48,760**	**2,610**	**2,078**	**339,612**	**396,560**
PAD District 2								
Illinois	4	7	1	0	112	94	15.507	21.399
Indiana	0	0	27	93	3	11	4.856	7.638
Iowa	0	0	0	0	0	0	321	100
Kansas	0	1	0	0	0	0	993	697
Kentucky	0	0	0	0	0	0	1.197	1.150
Michigan	44	30	23	55	70	136	4.285	8.947
Minnesota	40	0	43	273	4	18	1.732	1.460
Missouri	0	0	2	0	3	22	856	656
Nebraska	0	3	0	0	0	0	198	57
North Dakota	0	0	0	0	17	1	1.171	1.130
Ohio	0	0	1	37	268	630	2.488	5.920
Oklahoma	0	0	0	0	73	0	700	745
South Dakota	0	0	0	0	6	13	51	161
Tennessee	20	32	2	45	13	24	748	1.239
Wisconsin	3	32	27	46	22	22	2.212	871
Total	111	105	126	549	591	971	37,315	52,170
PAD District 3								
Alabama	0	0	2,400	2,208	0	0	6,350	4,686
Arkansas	0	0	0	0	2	0	1,803	2,449
Louisiana	0	0	19,154	23,899	685	188	48,260	55,687
Mississippi	0	0	2,501	3,117	0	250	5,570	9,725
New Mexico	0	0	0	0	2	18	716	856
Texas	0	58	31,389	35,719	17	241	62,069	68,671
Total	**0**	**58**	**55,444**	**64,943**	**706**	**697**	**124,769**	**142,075**
PAD District 4								
Colorado	0	0	0	0	2	5	14	165
Idaho	0	0	0	0	0	0	223	55
Montana	0	0	0	0	14	61	1.668	2.519
Utah	0	0	0	0	23	32	886	1.064
Wyoming	9	3	0	0	9	228	1.634	2.009
Total	9	3	0	0	48	326	4,426	5,812
PAD District 5								
Alaska	0	0	0	0	0	19	301	249
Arizona	0	0	0	0	0	0	297	227
California	0	0	53,250	63,149	432	226	81,392	126,463
Hawaii	0	0	860	1,116	335	470	13,323	13,311
Nevada	0	0	0	0	0	0	119	250
Oregon	0	0	5,551	3,644	33	3	10,927	8,407
Washington	0	0	4,384	6,471	29	5	14,029	16,505
Total	**0**	**0**	**64,045**	**74,380**	**829**	**723**	**120,388**	**165,413**
U.S. Total	170	178	152,586	188,632	4.784	4.705	626.510	762.030

Source: Energy Information Administration. Petroleum Supply Annual, June 1983

U.S. Sales of Distillate Fuel Oil By Uses

(Add 000 bbl.)

Year	Residential	Commercial	Industrial	Farm	Oil Company	Electric Utilities	Diesel	Other	Total
1982	180,760 (b)	75,669 (b)	71,340 (c)	68,453 (c)	29,482 (c)	12,134	375,124 (e)	164,253 (f)	974,864
1981 (a)	197,400 (b)	78,663 (b)	80,216 (c)	69,665 (d)	29,185 (c)	18,192	378,853 (e)	180,302 (f)	1,032,476
1980 (a)	227,261 (b)	92,136 (b)	86,089 (c)	73,615 (d)	24,205 (c)	31,812	377,136 (e)	176,355 (f)	1,086,709
1979 (a)	270,306 (b)	99,723 (b)	99,583 (c)	84,926 (d)	22,043 (c)	46,579	392,614 (e)	198,600 (f)	1,214,374

(a) In 1979, DOE changed its sampling and reporting formulas. It eliminated the "heating oils" category and added a new farm category. The sum of the first four categories is roughly related to the old heating oil category but cannot be construed as comparable. (b) Primarily space and water heating. (c) Includes some space heating but primarily equipment fuel. (d) Includes space and water heating, crop drying, farm equipment, etc. (e) Includes 37,118,000 bbl. of off-highway diesel in 1982. (f) In 1982, consisted of 93,150 railroad, 33,885 vessel bunkering, 37,118 military and 19,639 miscellaneous. For similar data on 1981, 1980, and 1979, see the 1983 Factbook. The pre-1979 categories are as follows.

Year	Heating Oils	Industrial Use	Oil Company Use	Electric Utilities	Railroads	Vessel Bunkering	Military Use	Diesel Fuel	All Other	Total
1978	533,069	94,797	19,410	77,175	99,841	37,591	20,320	367,799	14,509	1,257,061
1977	538,845	96,502	19,954	76,681	99,306	33,512	20,121	330,864	14,394	1,230,179
1976	543,895	79,956	14,523	60,570	97,467	28,330	17,574	297,249	11,365	1,150,929
1975	488,388	63,993	13,633	63,420	93,191	26,138	18,004	266,903	10,096	1,043,746
1970	521,135	43,668	11,518	24,770	88,416	19,503	12,447	194,919	10,874	927,250
1965	475,992	42,484	10,430	3,661	86,436	15,532	14,953	124,122	13,281	786,891
1960	438,010	34,271	8,347	4,742	86,490	18,730	10,793	74,562	7,380	683,325

Source: Deliveries of fuel oil and kerosine in 1981, Petroleum Supply Annual, Department of Energy, July, 1982.

U.S. Sales of Residual Fuel Oil By Uses

(Add 000 bbl.)

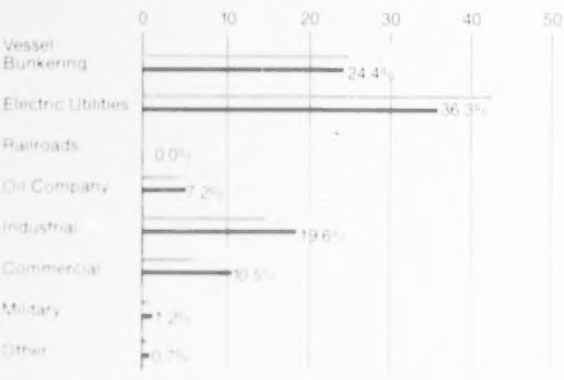
Year	Vessel Bunkering	Electric Utilities	Railroads	Oil Companies	Industrial	Commercial	Military	Other	Total
1982	152,586	227,419	170	45,319	122,619	65,781	7,829	4,784	626,510
1981 (a)	188,632	325,486	178	51,870	117,024	67,035	7,008	4,795	762,030
1980 (a)	213,131	390,105	665	59,519	163,564	98,034	8,066	4,382	937,466
1979 (a)	190,543	486,636	245	51,062	198,759	82,729	7,736	16,900	1,034,610

(a) In 1979, DOE changed its sampling and reporting formulas in such a way that none of the new data are directly comparable to the pre-1979 data, which follow. Also, in its 1981 update, DOE revised the totals for 1979 and 1980.

Year	Vessel Bunkering	Electric Utilities	Railroads	Oil Company	Industrial Use	Heating Oils	Military Use	All Other	Total
1978	157,495	533,193	206	57,690	169,403	164,536	16,583	4,127	1,103,233
1977	128,966	569,429	329	60,582	171,967	168,279	16,646	4,729	1,129,927
1976	117,458	492,974	423	58,212	153,596	178,139	18,561	5,785	1,025,148
1975	96,673	454,935	583	50,487	116,675	154,103	19,068	6,066	898,572
1970	89,850	312,420	2,222	38,318	139,647	185,031	28,704	7,925	804,287
1965	73,639	114,884	4,001	34,354	140,602	156,254	40,380	10,004	574,118
1960	94,084	85,408	5,610	45,061	157,270	125,088	31,724	6,291	550,536

Sales of Residuals by Use as Percent of Total

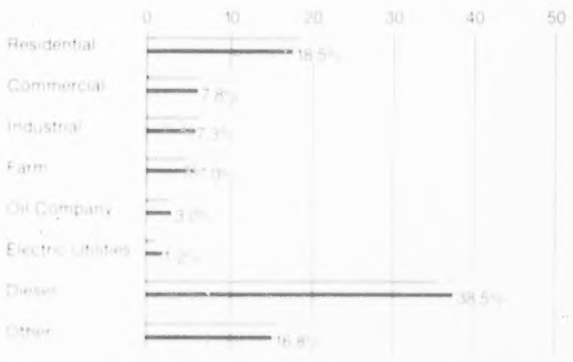
1982 = 626,510,000 bbl.



Source: Deliveries of Fuel Oil and Kerosene in 1982, Energy Information Administration, Petroleum Supply Annual, June 1983.

Sales of Distillates by Use as Percent of Total

1982 = 974,864,000 bbl.



Source: Deliveries of Fuel Oil and Kerosene in 1982, Energy Information Administration, Petroleum Supply Annual, June 1983.

World Oil Production by Area

(Add 000 bbl.)

Year	United States	Canada	Latin American	Western Europe	Middle East	Africa	Asia-Pacific	Total Free World	Communist Nations	Total World
1975	3,056,779	520,666	1,603,333	199,950	7,160,993	1,826,255	806,329	15,174,305	4,328,030	19,502,335
1976	2,976,180	488,680	1,625,069	311,858	8,115,708	2,134,861	922,818	16,575,174	4,616,366	21,191,540
1977	3,009,265	482,021	1,647,362	489,328	8,186,851	2,276,007	1,017,244	17,108,078	4,792,617	21,900,695
1978	3,175,927	483,260	1,736,427	643,149	7,884,927	2,233,791	1,037,520	17,195,001	4,963,250	22,158,251
1979	3,114,545	546,040	1,919,535	828,550	7,868,670	2,423,600	1,051,200	17,752,140	5,118,030	22,870,170
1980	3,146,502	521,184	2,036,058	893,406	6,735,498	2,226,378	1,000,278	16,559,304	5,206,350	21,765,654
1981	3,128,780	469,025	2,179,415	955,570	5,749,480	1,672,065	1,027,110	15,181,445	5,192,125	20,373,570
1982	3,156,715	452,965	2,255,355	1,085,145	4,581,480	1,622,790	961,410	14,116,160	5,278,995	19,395,155

Source: American Petroleum Institute Data Book

World Crude Oil Reserves by Area

(Add 000 bbl.)

Year (a)	United States	Canada	Latin America	Middle East	Africa	Asia-Pacific	Western Europe	Total Free World	Communist Nations	Total World
1976	32,682,127	6,653,002	35,368,000	368,410,570	65,085,220	21,234,230	25,487,700	554,920,849	103,000,000	657,920,849
1977	30,942,166	6,257,082	29,608,950	367,681,220	60,570,200	19,391,140	24,538,810	538,989,568	101,100,000	640,089,568
1978	29,486,402	5,970,872	40,370,000	366,166,000	59,200,150	19,749,270	26,862,500	547,805,194	98,000,000	645,805,194
1979	27,803,760	6,860,000	41,246,500	369,996,000	57,892,125	20,007,200	23,966,000	547,771,585	94,000,000	641,771,585
1980	27,051,289	6,800,000	56,472,500	361,947,300	57,072,100	19,355,200	23,476,400	522,174,789	90,000,000	642,174,789
1981	29,805,000	6,400,000	69,489,837	362,071,000	55,148,375	19,630,500	23,085,000	565,629,712	86,300,000	651,929,712
1982	29,426,000	7,300,000	84,982,270	362,839,950	56,171,630	19,150,800	24,634,500	584,505,150	85,845,000	670,350,150
1983	29,785,000	7,020,000	74,482,066	369,285,893	57,821,690	19,756,077	22,923,680	585,074,406	85,115,000	670,189,406

(a) As of Jan. 1 of each year.
Source: American Petroleum Institute Data Book.

World Crude Oil Refining Capacity by Area

(barrels per day)

Year	United States	Other Western Hemisphere	Total Western Hemisphere	Middle East	Africa	Asia-Pacific	Europe	Total Free World	Sino Soviet Bloc	Total World
1976	15,236,621	9,713,093	24,949,714	3,284,951	1,328,200	9,868,344	19,972,306	59,403,515	12,406,000	71,809,515
1977	16,398,372	10,015,186	26,413,558	3,347,855	1,444,400	10,047,965	20,859,376	62,113,154	13,067,810	75,180,964
1978	17,047,724	10,592,020	27,352,020	3,506,484	1,467,157	10,176,819	20,728,204	63,352,984	13,938,000	77,290,984
1979	17,440,885	10,273,030	27,713,915	3,546,029	1,667,608	10,284,966	20,328,614	63,541,132	14,748,000	78,289,132
1980	17,988,121	10,683,671	28,671,792	3,518,080	1,666,108	10,386,375	20,243,747	64,486,102	15,346,000	79,832,102
1981	18,620,520	10,716,881	29,337,401	3,729,646	1,697,658	10,554,691	20,205,799	65,524,895	16,036,500	81,561,395
1982	17,889,734	10,720,055	28,609,789	3,312,152	1,761,870	10,966,825	19,444,519	64,095,155	16,533,000	80,628,155
1983	16,800,000	9,873,816	26,673,816	3,685,333	1,822,015	10,902,204	17,124,989	60,268,447	16,873,000	77,141,447

Source: America Petroleum Institute Data Book

World Natural Gas Production by Area

(Add 000,000 cubic feet)

Year	United States	Canada	Latin America	Middle East	Africa	Asia-Pacific	Western Europe	Total Free World	Communist Nations	Total World
1975	20,108,661	3,075,693	1,735,060	1,436,210	670,402	938,365	5,966,659	33,931,050	13,276,275	47,207,325
1976	19,952,438	3,067,353	1,722,106	1,492,772	905,792	1,173,878	6,343,593	34,657,932	14,801,281	49,459,213
1977	20,025,463	3,230,672	1,865,734	1,506,982	919,464	1,329,016	6,502,502	35,379,833	14,720,257	50,100,090
1978	19,974,033	3,128,056	2,012,912	1,579,478	1,117,416	1,469,154	6,649,855	35,930,904	15,818,398	51,749,302
1979	20,471,260	3,646,500	2,610,000	1,624,700	1,027,900	1,827,900	6,866,800	38,075,060	19,591,400	57,666,460
1980	20,378,787	2,668,300	3,297,500	1,221,300	884,700	2,558,400	6,668,700	37,677,687	21,069,900	58,747,587
1981	20,177,701	2,623,000	3,227,000	1,542,000	1,947,000	2,765,000	6,906,000	39,187,701	19,210,000	58,397,701
1982	---	---	---	---	---	---	---	---	---	---

Source: American Petroleum Institute Data Book

Estimated Crude Oil Reserves in 20 Leading Nations

	Reserves (Add 000 bbl.)		% of Free World Reserves		% of Total World Reserves	
Nation	**1983(a)**	**1982**	**1983**	**1982**	**1983**	**1982**
Saudi Arabia (b)	162,400,000	164,600,000	27.8%	28.1%	24.2%	24.6%
Kuwait (b)	64,230,000	64,480,000	11.0	11.0	9.6	9.6
U.S.S.R.	63,000,000	63,000,000	—	—	9.4	9.4
Iran	55,308,000	57,000,000	9.5	9.7	8.3	8.5
Mexico	48,300,000	55,990,000	8.3	9.7	7.2	8.5
Abu Dhabi	41,000,000	30,600,000	7.0	5.2	6.1	4.6
U.S.A.	30,510,000	29,426,000	5.2	5.0	4.6	4.4
Iraq	29,785,000	29,700,000	5.1	5.1	4.4	4.4
Libya	21,500,000	22,600,000	3.7	3.9	3.2	3.4
Venezuela	21,500,000	20,300,000	3.7	3.5	3.2	3.0
China	19,485,000	19,895,000	—	—	2.9	3.0
Nigeria	16,750,000	16,500,000	2.9	2.8	2.5	2.5
United Kingdom	13,900,000	14,800,000	2.4	2.5	2.1	2.2
Indonesia	9,550,000	9,800,000	1.6	1.7	1.4	1.5
Algeria	9,440,000	8,080,000	1.6	1.4	1.4	1.2
Norway	7,020,000	7,620,000	1.2	1.3	1.0	1.1
Canada	6,080,000	7,300,000	1.2	1.2	1.0	1.1
Qatar	3,425,000	3,434,000	0.6	0.6	0.5	0.5
Egypt	3,325,000	2,930,000	0.6	0.5	0.5	0.4
Malaysia	3,325,000	2,800,000	0.6	0.5	0.5	0.4
Total Free World	**585,074,406**	**585,505,150**	**100.0%**	**100.0%**	**87.3%**	**87.3%**
Total World	**670,189,406**	**670,350,150**	**—**	**—**	**100.0%**	**100.0%**

(a) Preliminary; (b) Saudi Arabia and Kuwait share equally the production from the Neutral Zone, located between the two nations, which had reserves of 5,840,000,000 in 1983 and 6,500,000,000 in 1982. These reserves are not included in the above figures.
Source: American Petroleum Institute, Basic Data Book, September, 1983.

Crude Production in 20 Leading Nations

	Production (Add 000 bbl.)				% of Free World Production		% of Total World Production	
	1982		1981					
Nation	**Total**	**b/d**	**Total**	**b/d**	**1982**	**1981**	**1982**	**1981**
U.S.S.R.	4,388,760	12,024	4,303,350	11,790	—	—	22.6%	21.1%
United States (a)	3,156,715	8,649	3,513,125	9,625	22.4%	23.1%	16.3	17.2
Saudi Arabia (b)	2,304,975	6,315	3,128,780	8,572	16.3	20.6	11.9	15.4
Mexico	1,086,970	2,978	843,880	2,312	7.7	5.6	5.6	4.1
Iran	808,110	2,214	769,420	2,108	5.7	5.1	4.2	3.8
United Kingdom	772,705	2,117	738,760	2,024	5.5	4.9	4.0	3.6
China	740,585	2,029	661,015	1,811	—	4.4	3.8	3.2
Venezuela	690,215	1,891	585,640	1,604	4.9	3.9	3.6	2.9
Indonesia	488,735	1,339	547,500	1,500	3.5	3.6	2.5	2.7
Nigeria	472,675	1,295	527,425	1,445	3.3	3.5	2.4	2.6
Canada	452,965	1,241	504,065	1,381	3.2	3.3	2.3	2.5
United Arab Emirates	443,110	1,214	469,025	1,285	3.1	3.1	2.3	2.3
Libya	422,670	1,158	415,065	1,137	3.0	2.7	2.2	2.0
Iraq	354,780	972	362,445	993	2.5	2.4	1.8	1.8
Algeria	259,150	710	345,655	947	1.8	2.3	1.3	1.7
Kuwait	244,915	671	293,095	803	1.7	1.9	1.3	1.4
Egypt	242,725	665	218,270	598	1.7	1.4	1.3	1.1
Norway	189,070	518	182,865	501	1.3	1.2	1.0	0.9
Argentina	176,660	484	181,040	496	1.3	1.2	0.9	0.9
Brunei-Malaysia	167,900	460	156,585	429	1.2	1.0	0.9	0.8
Total Free World					**100.0%**		**72.8%**	**74.5%**
Total World							**100.0%**	**100.0%**

(a) Includes lease condensate. (b) Excludes Neutral Zone production which was 311,000,000 b/d in 1982.
Source: American Petroleum Institute, Basic Data Book, September, 1983.

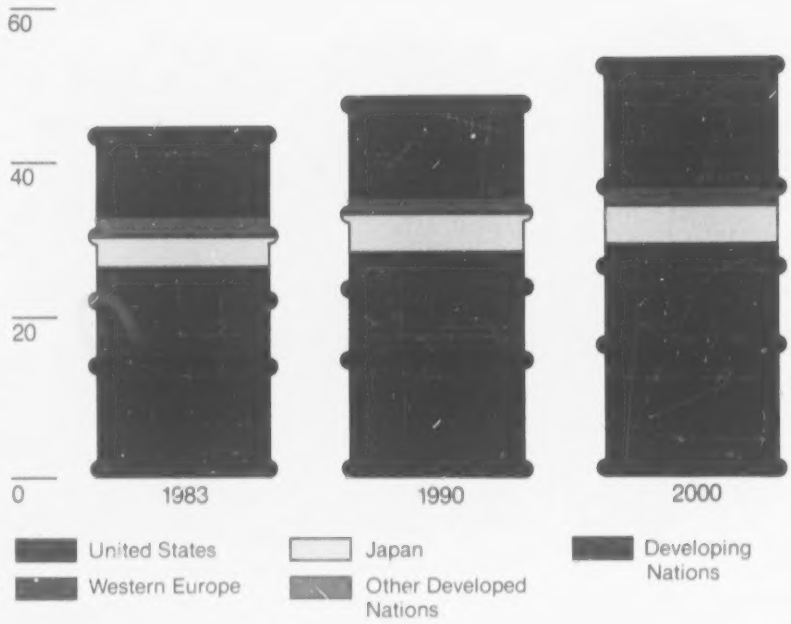
OPEC to Dominate Global Supplies

Conoco, Inc., in a projection that looks ahead to the year 2000, believes that world oil demand will rise about 1% per year despite efforts to conserve and limit consumption. Most of the global increase, Conoco says, will come in the developing nations where non-oil alternatives often are not financially viable.

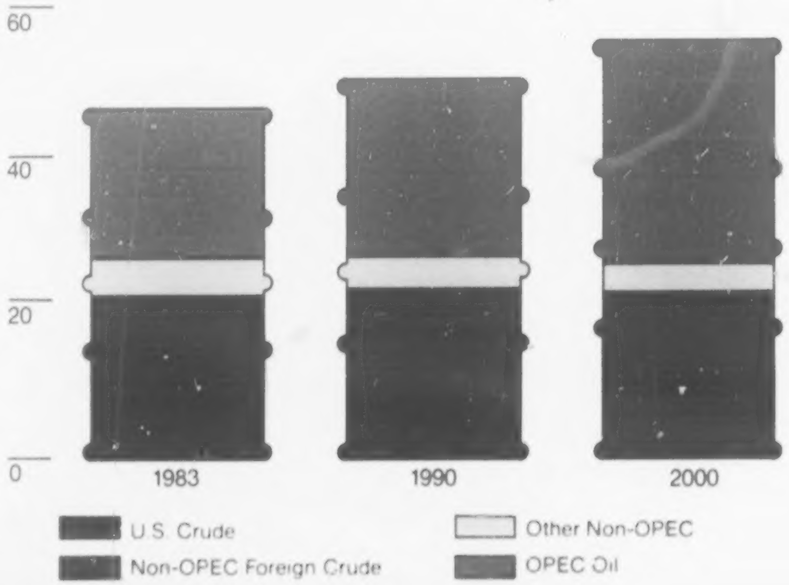
Here's the way Conoco sees it:

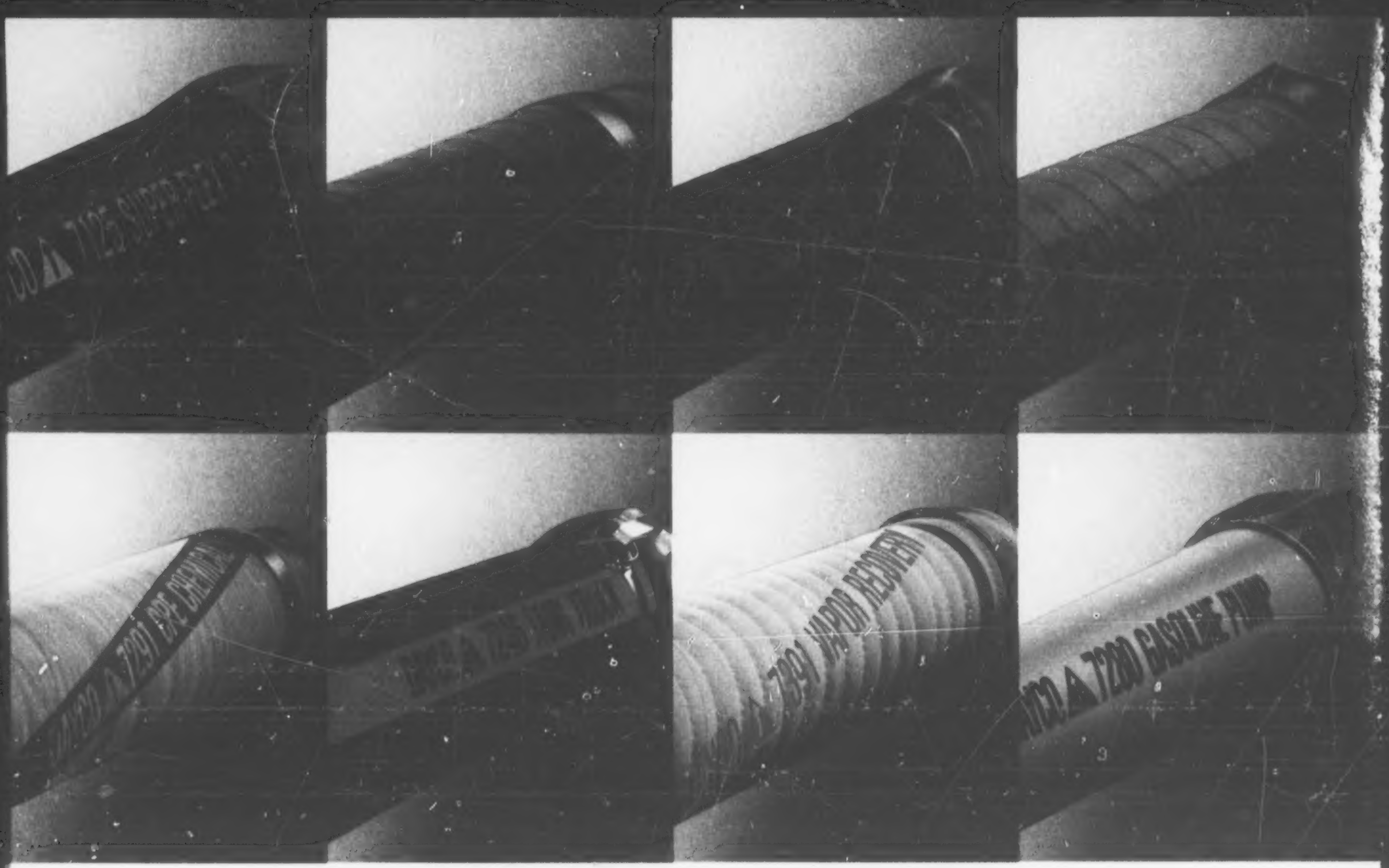
- World oil demand is expected to increase from 44.5-million b/d in 1983 to 48-million b/d in 1990 and 54-million b/d at the century's end. This should provide an expanding market for OPEC oil.
- U.S. oil consumption growth will be particularly slow, averaging only .05% per year. In Western Europe, which is particularly dependent on OPEC, oil use will increase 1% annually during the remainder of this decade but then stabilize.
- In Japan, which also is highly dependent on imported energy, oil consumption growth will lag behind the world average, increasing from less than 4.5-million b/d currently to 5-million b/d in 2000. Japan's incremental energy needs will be met primarily by nuclear power, liquefied natural gas and coal.
- In the developing countries, oil demand will be burgeoning in comparison to the rest of the world, climbing from 11-million b/d at present to 16-million b/d in 2000. These countries will account for two-thirds of the increase in world oil demand, exhibiting an average annual increase of nearly 2.5%. This growth reflects the fact that non-oil energy sources typically require enormous capital investments that many developing countries can ill afford to make given their current debt burdens.
- Non-OPEC oil output will peak in the late 1980s and then decline slowly. OPEC production will grow to almost 29-million b/d in 2000, up from 18-million b/d currently, thereby increasing the world's vulnerability to supply disruptions and resulting price shocks.
- Rising real oil prices should stimulate a resumption of aggressive exploration and development activity in the 1990s. The largest additions to non-OPEC supplies will come from Mexico and the Norwegian sector of the North Sea. Significant increases also will be registered by offshore developments in Africa and Asia. But these increments likely will be too little and occur too late to offset declining production in mature fields, especially in the United States, the United Kingdom and Canada. Overall, non-OPEC crude production is projected to peak in the late 1980s at 22-million b/d, up from 21-million b/d currently. By 2000, non-OPEC crude output will have fallen to slightly more than 21-million b/d.

World Oil Demand
(Million Barrels Per Day)



World Oil Supply
(Million Barrels Per Day)





SOURCE OF POWER

Dayco . . . First Choice for Hose Quality and Integrity. Why settle for second best?

In the development and manufacture of critical application hose for aircraft refueling, chemical transfer, fuel transfer and curb pump use, Dayco actually sets the standards . . . the toughest in the marketplace.

100% tested. To assure consistent quality and performance, Dayco pump hose is 100% pressure and static continuity tested. Other tests, including coupling pull-off, go well beyond UL standards.

#1 hose supplier. This dedication to excellence has led an overwhelming majority of the nation's pump manufacturers to equip their pumps with Dayco hose.

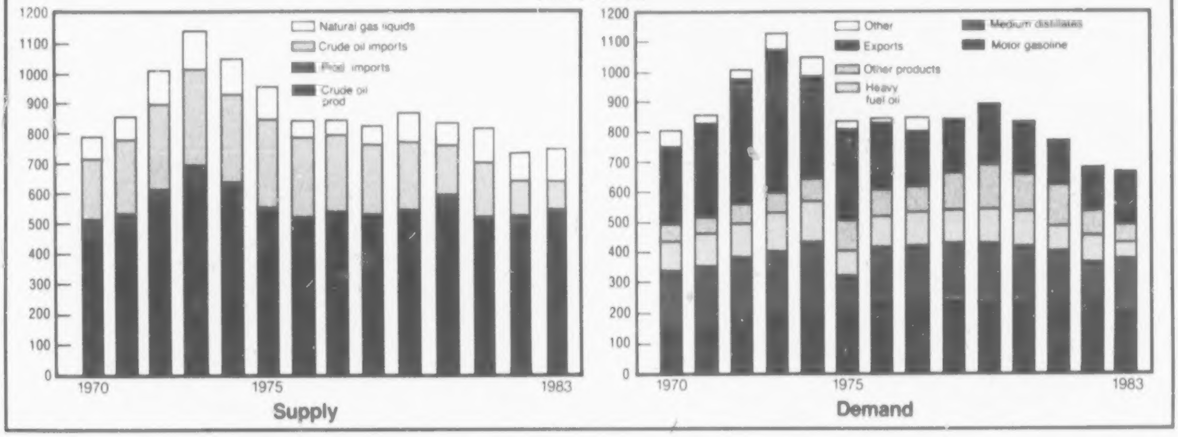
New "semi-hardwall" hose. Dayco's curb pump line, the industry's broadest, now has something new! Super-Flex II, a unique semi-hardwall hose that combines the toughness and durability of hardwall with the resiliency of softwall. This hose is tough enough to take the abuse and punishment of self-service use. Eliminates meter creep, too. The flexible nylon helix prevents kinking and enables Super-Flex II to bounce back to its original shape even after severe twisting or crushing. You get best-of-both-worlds performance at a very competitive price.

DAYCO ▲ 7157 GST
DAYCO ▲ 7194 MPT
DAYCO ▲ 7289 DRAGON BREATH
DAYCO ▲ 715

If you use curb pump, tank truck or any critical application hose, why settle for second best? Dayco hose is built and fully tested for longer life, consistently higher performance. For more information, check with your Dayco Distributor, the Source of Power in your area. A most dependable, knowledgeable and competitive source for hose. Or contact: Dayco Corporation, Rubber Products Company, 333 West First Street, Dayton, Ohio 45402. 513/226-5923.

DAYCO

Petroleum Supply-Demand in Canada
(millions of barrels)



Refined Product Sales in 1983

(Cubic Meters) (a)

	Aviation Gasoline	Motor Gasoline	Aviation Turbine Fuel	Kerosene	Diesel Fuel	Light Fuel Oil	Heavy Fuel Oil	Lubes & Greases
Newfoundland	3,955	548,943	236,936	47,737	432,666	320,071	284,450	12,246
Prince Edward Island	2,382	168,759	5,715	13,508	49,929	105,084	16,869	2,170
Nova Scotia	2,363	1,103,128	139,888	70,591	621,429	761,629	909,807	26,182
New Brunswick	2,927	921,163	50,593	45,807	319,882	476,142	932,216	19,258
Quebec	26,313	6,785,003	713,266	221,297	2,121,825	3,337,886	3,327,484	144,329
Ontario	41,695	11,739,729	1,223,674	116,573	3,567,264	2,652,192	1,394,632	388,538
Manitoba	22,357	1,471,716	166,037	76,279	800,320	74,602	138,778	32,014
Saskatchewan	10,902	1,907,985	80,962	118,623	1,123,799	137,062	20,932	49,025
Alberta	24,775	4,649,184	709,824	57,182	2,565,737	75,896	37,492	114,393
British Columbia	29,272	3,799,409	505,167	65,830	2,129,637	453,681	841,243	93,785
Yukon	3,790	48,673	3,973	19,157	30,131	30,663	114	1,025
Northwest Terr.	8,748	42,877	69,414	17,866	161,734	95,621	25,265	2,886
Total	**179,479**	**33,186,570**	**3,905,449**	**870,450**	**13,924,353**	**8,520,529**	**7,929,282**	**885,850**
Total 1982	**180,239**	**34,279,418***	**4,059,745**	**1,207,384**	**13,530,304***	**10,441,563**	**10,505,508***	**882,390**

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* = Revised figure
(a) Note: 6.2886 gal. (Imperial) = 1 cubic meter, and .158991 cubic meter = 1 barrel
Source: Statistics Canada

Gasoline Outlets (a)

Province	Outlets
Newfoundland	1,190
Prince Edward Island	297
Nova Scotia	1,184
New Brunswick	1,535 (b)
Quebec	7,181
Ontario	8,202
Manitoba	1,800 (b)
Saskatchewan	*
Alberta	2,518
British Columbia	*
Yukon	*
Northwest Territories	*
Total	**23,907**

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*Not available (a) licensed (b) estimated
Source: Statistics Canada

Premium Ratios

Province	Premium (a) December 1983	Premium (a) December 1982
Alberta, Northwest Territories and Yukon	4.7%	5.9%
British Columbia	8.1	9.7
Manitoba	3.0	3.5
Maritimes	7.2	8.8
Newfoundland	4.9	6.1
Ontario	9.9	11.4
Quebec	13.6	16.2
Saskatchewan	2.2	2.9
Total Canada	**8.8%**	**10.6%**

(a) Contains leaded and unleaded premium
Source: Ethyl Corp., Petroleum Chemicals Div.

Canadian Oil Companies: How

Company	TOTAL BRANDED RETAIL OUTLETS	Number of Provinces where marketed	BRANDED SERVICE STATIONS								
			Total true branded service stations	Supplied directly	Supplied through jobbers & commission agents	Lessee/Dealer operated	Salary operated	Commission operated	Full-serve only	Self-serve only	Full-serve/ Self-serve
Chevron Canada Ltd.	307	1	277	196	81	203	0	74	190	81	6
Esso Canada (E)	3,652	10	3,330	2,452	1,200	3,119	72	461	3,051	601	0
Federated Co-Operatives Ltd. (xxx)	724	4	384	384	0	384	0	0	0	116	268
Gulf Canada Ltd.	2,487(A)	10	1,767	—	(B)	2,335	152	0	2,022	461	4
Husky Oil Operations Ltd. (xxx)	324	6	253	240	13	253	0	0	222	31	0
Imperial Oil Ltd. (x)	3,719	10	3,719	2,469	1,250	3,216	80	423	3,192	527	—
Irving Oil Ltd. (D)	—	—	—	—	—	—	—	—	—	—	—
Mohawk Oil Co. Ltd.	328	5	328	265	63	196	107	25	206	117	5
Petrocanada	2,668	10	2,668	2,257	441	2,2[illegible]1	57	320	2,074	587	7
Petrofina Canada Ltd. (x)	932	5	932	932	—	860	36	36	828	104	—
Shell Canada Ltd.	3,433(C)	10	3,433	2,274	1,159	2,826	153	454	2,863	570	0
Spur Oil Ltd. (Div. of Murphy Oil Co. Ltd.)	141	2	141	141	0	97	0	0	128	13	0
Sunoco (xxx)	872	3	872	872	0	662	201	9	662	210	0
Sunys Petroleum	67	2	67	67	0	2	5	60	39	28	0
Texaco Canada, Ltd.	2,661	10	2,661	1,475	1,186	754	0	558	2,103	558	0
Top Valu Gasmarts	103	2	103	103	0	38	11	52	103	0	0
Turbo Resources Ltd.	254	5	243	243	11	63	1	190	246	8	0
Ultramar Canada (xxx)	842	3	842	842	—	808	34	—	824	10	8

(xxx) Most recent information available (year-end 1982). 1984 questionnaire either was not answered or was returned incomplete.

(x) Year-end 1981 information. Questionnaire either was not answered or was returned incomplete.

(A) Includes outlets operated by Servico Ltd. and 24 outlets in Yukon and Northwest Territories.

(B) "Majority" are direct-supplied.

Brand Names of Gasoline and Motor Oils

Chevron Canada Ltd.

Gasolines	Motor Oils
Chevron (r&ur)	Chevron Special
Chevron Supreme (up)	Chevron Supreme
	Chevron Custom
	Chevron Delo 100
	Chevron Delo 300
	Chevron Delo 400

Esso Canada

Gasolines	Motor Oils
Esso (r)	Esso Plus
Esso 2000 (ur)	Esso Extra
Esso Extra (up)	Uniflo

Federated Co-operatives Ltd. (xxx)

Gasolines	Motor Oils
Sonic (r&p)	HD 7
Sonic (ur)	D-MO
	Sonic Premium
	Multrex

Gulf Canada Ltd.

Gasolines	Motor Oils
Gulf (r)	Gulf Premium
Gulf (ur&up)	Super Plus
	Super Premium II

Husky Oil Operations Ltd. (xxx)

Gasolines	Motor Oils
Husky (r)	Husky Super Duty
Husky (ur)	Husky Heavy Duty
	Husky HD Special
	Husky Stratolube
	Strato Plus

Imperial Oil Ltd. (x)

Gasolines	Motor Oils
Esso (r)	Essolube HD
Esso 2000 (ur)	Essolube HD X Plus
Esso Extra (up)	Essolube HD 3
	Esso Plus
	Esso Extra
	Uniflo

Mohawk Oil Co. Ltd.

Gasolines	Motor Oils
Mohawk (r)	Mohawk Propane
Mohawk (ur&up)	Mohawk Premium
	Mohawk Multigrade
	Mohawk Heavy Duty Plus

Murphy Oil Co. Ltd. (x)

Gasolines	Motor Oils
Spur (r)	Spur Supreme
Spur (ur&up)	Spur HD
Gas (r)	Spur Regular
Gas (ur&up)	Spur A.T.F.
	Spur 2 Stroke

Petro-Canada

Gasolines	Motor Oils
Petro-Canada (r)	Heavy Duty
Petro-Canada (ur&up)	Universal
	Multi Plus
	Multi

Petrofina Canada Ltd. (x)

Gasolines	Motor Oils
Fina Regular (r)	Regular M.O. Single Grade
Fina Lead-Free (ur)	Dieseltonic H.D. 30
Fina Super 100 Lead-Free (up)	Universal MG 15W40
	Heavy Duty 10W20-20W-30, 40
	Multi 10W30
	Multi-Plus 5W30-10W40

Shell Canada Ltd.

Gasolines	Motor Oils
Shell (r)	Shell X-100
Shell Ultra (up)	Shell Super Plus
Shell Super Non-Leaded (up)	Shell Super Plus Arctic

Spur Oil Ltd.

Gasolines	Motor Oils
Spur (r)	Castrol Products
Spur (ur&up)	Spur Supreme
	Spur Multi-grade

Sunoco Inc. (xxx)

Gasolines	Motor Oils
Sunoco 200 (r)	Dynalube, Pronto
Sunoco Leaded Blend (p)	Dieselube, Sunfleet
Sunoco Reg Unleaded (ur)	Special
Sunoco Premium Unleaded (up)	Cam 2
Sunoco [illegible] Unleaded (other)	
Pronto (r)	
Pronto (ur&up)	

Sunys Petroleum Inc.

Gasolines	Motor Oils
Sunys (r)	
Sunys (ur&up)	
Cansave (r)	
Cansave (ur&up)	
Econobec (r) (ur&up)	

Texaco Canada, Ltd.

Gasoline	Motor Oils
Fire Chief (r)	Havoline
Lead-Free Texaco (up)	URSA Havoline Supreme
SkyChief Lead-Free (usp)	URSA Super Plus
	URSA Superflow

Top Valu Gasmarts

Gasoline	Motor Oils
Top Value (r) (p) (sp) (other)	
Top Value (ur) (up) (usp) (other)	

Turbo Resources Ltd.

Gasoline	Motor Oils
Turbo (u)	Turbo
Turbo No-Lead (ur&up)	Florite
Turbo (up)	Red Ram

Ultramar Canada Inc.

Gasoline	Motor Oils
Ultramar (r&p)	Ultralube
Ultramar (ur&up)	Ultralube Monograde HD
XL (r, ur&up)	Ultralube Super Multigrade
Arrow (r, ur&up)	

(xxx) Most recent data available—1983

(x) 1982 data

KEY

Gasoline

(r) Regular

(p) Premium

(sp) Super Premium

(u) Unleaded

Motor Oils . . . Brand names are listed lowest price grade first.

Distribution Is Organized

BRANDED JOBBERS				COMMISSION AGENTS				BULK PLANTS				TERMINALS			
	SELLING . . .				SELLING . . .				COMPANY OPERATED				COMPANY OPERATED		
Total	Gasoline only	Fuel Oil only	Gasoline and fuel oil	Total	Gasoline only	Fuel oil only	Gasoline and fuel oil	Total	Salary operated	Commission operated	Jobber operated	Total	Salary operated	Commission operated	Jobber operated
3	0	0	3	41	0	0	41	44	1	41	2	2	2	0	0
9	0	0	9	614	0	614	0	639	0	632	7	54	47	7	0
—	—	—	—	—	—	—	—	340	340	0	—	—	—	—	—
221	0	0	221	279	0	0	279	584	84	279	221	55	45	10	0
32	0	0	32	—	—	—	—	—	—	—	—	1	1	0	—
0	—	—	—	692	—	2	690	665	—	665	63	56	7	—	
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
2	0	0	2	25	25	0	0	0	0	0	2	0	0	0	0
23	6	17	0	240	0	0	240	198	22	169	7	24	24	0	0
—	—	—	—	123	—	—	123	23	22	1	—	12	12	—	—
190	0	24	166	695	453	0	242	268	39	229	9	21	21	0	0
0	0	0	0	0	0	0	0	0	2	0	2	3	3	0	0
0	0	0	0	9	9	0	0	20	20	—	7	7	0	0	
5	0	0	5	0	0	0	0	0	0	0	0	0	0	0	0
0	—	—	—	345	166	38	141	258	57	201	—	29	29	0	—
38	38	0	0	54	54	0	0	0	0	0	0	0	0	0	0
0	—	—	—	191	33	0	158	18	0	17	1	1	1	0	0
—	—	—	—	67	—	—	67	84	84	—	—	47	47	—	—

(C) Includes Beaver outlets and 4 outlets in Northwest Territories.
(D) Refuses to disclose any operating details.
(E) Division of Imperial Oil Ltd.

Branded Retail Outlets in Canada

Company	Total	No. of Provinces	Newfoundland	Nova Scotia	New Brunswick	Quebec	Ontario	Prince Edward Island	Manitoba	Saskatchewan	Alberta	British Columbia
Chevron Canada Ltd.	307	1	—	—	—	—	—	—	—	—	—	307
Esso Canada (C)	3,652	10	189	189	178	649	993	38	242	370	363	441
Federated Co-Operatives Ltd. (xxx)	724	4	—	—	—	—	—	—	132	427	91	24
Gulf Canada Ltd.	2,487(A)	10	57	72	42	510	503	8	227	344	404	296
Husky Oil Operations Ltd. (xxx)	324	6	—	—	—	—	61	—	38	31	102	89
Imperial Oil Ltd. (x)	3,719	10	192	203	175	759	867	45	267	357	389	465
Irving Oil Ltd. (D)	—	—	—	—	—	—	—	—	—	—	—	—
Mohawk Oil Co. Ltd.	328	5	—	—	—	—	—	3	23	31	187	84
Murphy Oil Co. Ltd. (x)	240	2	—	—	—	150	90	—	—	—	—	—
Petro Canada	2,668	10	8	141	94	938	1,121	13	36	48	106	163
Petrofina Canada Ltd. (x)	932	5	—	129	87	403	302	11	—	—	—	—
Shell Canada Ltd.	3,433(B)	10	—	114	129	830	1,161	31	302	216	303	343
Spur Oil Ltd. (Div. of Murphy Oil Co. Ltd.)	141	2	—	—	—	136	5	—	—	—	—	—
Sunoco (xxx)	872	3	—	—	—	330	540	—	—	—	2	—
Sunys Petroleum Inc.	67	2	—	—	—	—	—	—	—	—	—	—
Texaco Canada, Ltd.	2,661	10	40	134	144	760	891	27	115	146	213	191
Top Valu Gasmarts	103	2	—	—	—	20	83	—	—	—	—	—
Turbo Resources Ltd.	254	5	—	—	—	—	53	—	11	48	116	26
Ultramar Canada (x)	842	3	185	—	—	420	237	—	—	—	—	—

(xxx) Most recent information available (year end 1982). 1984 questionnaire either was not answered or was returned incomplete.
(x) Year end 1981 information. 1983 and 1984 questionnaire either was not answered or was returned incomplete.
(A) Includes 24 outlets in Yukon and Northwest Territories.
(B) Includes 4 outlets in Northwest Territories.
(C) Division of Imperial Oil Ltd.
(D) Refuses to disclose any operating details.

Canadian Statistics

Motor Vehicle Registrations 1982

Province	Passenger Cars	Trucks	Buses	Motorcycle	Others	Total Vehicles	Trailers
Newfoundland	129,387	56,440	*	4,687	*	190,514	18,353
Prince Edward Island	48,177	17,397	418	2,011	217	68,220	6,852
Nova Scotia	363,883	147,691	1,529	21,150	1,119	535,372	48,524
New Brunswick	249,819	99,523	696	10,793	11,965	372,796	55,464
Québec	2,376,745	294,706	14,869	106,813	33,017	2,826,150	328,041
Ontario	3,842,743	1,067,535	23,827	119,642	6,448	5,060,195	733,956
Manitoba	464,916	187,083	137	17,461	732	670,329	95,714
Saskatchewan	375,165	294,904	4,485	12,269	651	687,474	102,316
Alberta	1,259,791	460,217	7,845	59,898	*	1,787,751	247,187
British Columbia	1,406,370	591,925	*	74,938	1,297	2,074,530	256,592
Yukon	6,879	11,358	166	709	*	19,112	3,696
Northwest Terr.	6,480	10,562	93	1,082	57	18,274	2,787
Total	**10,530,355**	**3,239,341**	**54,065**	**431,453**	**55,503**	**14,310,717**	**1,899,482**

*Figures not available
Source: Statistics Canada

New Motor Vehicle Sales

Year	Total	Passenger cars	Commercial vehicles
1983	1,081,088	843,318	237,770
1982	920,902	713,481	207,421
1981	1,190,882	904,195	286,687

Source: Statistics Canada

Automobiles Per Household 1983

	Households (add 000)			
Province	1 auto	2 autos	3 or more	without
Newfoundland	81	26	5	40
Prince Edward Island	21	9	—	6
Nova Scotia	142	54	14	59
New Brunswick	111	47	11	40
Quebec	1,264	350	68	559
Ontario	1,554	747	160	617
Manitoba	184	70	21	85
Saskatchewan	165	83	32	55
Alberta	344	222	84	122
British Columbia	465	267	86	187
Total	**4,332**	**1,876**	**482**	**1,770**

Note: Data from a sample survey only
—amount too small
Source: Statistics Canada

Factory Sales of Auto Batteries

	1983	Dollar Value*	1982	Dollar Value*
Orig. equip.	confidential	—	confidential	—
Replacement	2,695,969	94,487,362	3,023,971	$109,013,649
Heavy-duty transport, motor coach, bus, diesel starting batteries, for replacement	405,742	19,476,813	272,436	17,014,455

*Canadian
Source: Statistics Canada

Factory Tires

	1982	$000	1981	$000
Passenger cars belted bias	3,974,605	112,088	3,164,682	89,745
Light trucks, NES	1,180,053	64,368	1,434,965	73,056
Buses & heavy trucks	711,543	99,284	823,115	114,998
Farm vehicles and off-highway, NES	660,651	103,618	728,364	123,167

N.E.S.: Not elsewhere specified
Source: Statistics Canada

Drivers Licenses 1982

Province	Drivers
Newfoundland	270,000
Prince Edward Island	23,174
Nova Scotia	493,081
New Brunswick	380,336
Quebec	3,470,460
Ontario	5,370,892
Manitoba	579,813
Saskatchewan	560,861
Alberta	1,681,582
British Columbia	2,215,320
Yukon	16,946
Northwest Territories	18,611
Total	**15,081,076**

Source: Statistics Canada

Heating Fuels In 1983

	Households (add 000)						
	Oil	Piped Gas	Bottled Gas	Electricity	Other	Wood	Total Households
Newfoundland	68	(a)	(a)	54	(a)	29	151
Prince Edward Island	31	(a)	(a)	(a)	(a)	6	38
Nova Scotia	198	(a)	4	27	5	36	270
New Brunswick	111	(a)	(a)	54	(a)	43	209
Quebec	906	191	(a)	1,061	(a)	76	2,241
Ontario	780	1,712	16	484	*	81	3,078
Manitoba	35	217	(a)	92	(a)	12	361
Saskatchewan	53	255	8	12	(a)	6	335
Alberta	11	742	11	—	(a)	(a)	773
British Columbia	197	565	8	184	(a)	50	1,005
Total	**2,390**	**3,681**	**55**	**1,974**	**19**	**341**	**8,460**

Note: Data from a sample survey [illegible]
(a) Amount too small
*Not Applicable
Other includes Coal and Coke
Source: Statistics Canada

Expressway wants you
to spend a few minutes
with our Q and A
...before you spend
thousands on their POS.

Station POS questions?

In a new field like service station POS the questions often outnumber the available answers. And the developmental pace is so fast that it seems decisions must be made before all the facts can possibly be gathered.

Incremental Sales

Q *Can any station POS system actually deliver more sales?*

A Yes. We know that people buy gas where it's most convenient. Because automated terminals make it easier, they bring in more customers. Customers that want fast service without the inconvenience of carrying cash.

Q *Beyond added convenience, what guarantee does a station owner have that his investment in new equipment will pay off in added sales?*

A It's simple. Each payment vehicle—whether debit card, Visa/MasterCard or private label credit—carries with it a loyal customer base. By accepting these cards, automated POS opens your business to an affluent new clientele—ready to buy and spend more at your stations.

Q *Sounds reasonable doesn't it? Added convenience and a larger customer base bring more sales. But, then can't all POS systems bring the same sales increment?*

A No way! Here's where Expressway separates itself from its big-name competition. With greater convenience: we've situated Expressway on top of the pump where it's most accessible. No trips back and forth from an island or kiosk terminal. No "double-dipping" to get a receipt. No confusion and no delays. With wider card acceptance: Expressway is easily programmed to accept the card programs you want. Expressway has the experience to link your stations to any network.

Q *Given that the right POS system can attract new customers, what is it about a system that will keep your customers coming back?*

A The key to repeat purchases is user-friendliness. Customers want a system that they are comfortable with. One that looks and acts like the ATM they are so used to. Expressway is that system. Features such as instant authorization and receipt availability, ATM-like P-I-N entry, and visual displays readable in even bright sunlight will keep your customers coming back.

Compatibility and Ease of Installation

Q *Doesn't the installation of any system require extensive construction in the station and replacement of most existing equipment?*

A No. With Expressway, little station modification is required. In many cases, the new wiring can even be pulled through existing station conduit. We also have the expertise to retro-fit to all existing dispensers, consoles and cash registers.

Q *What about the sizeable investment you may have already made in pumps, cash registers and other hardware?*

A Unlike most of our competitors, Expressway's only business is POS terminals. Not expensive computer packages or new gas dispensers. Our success can be found in our flexibility. Expressway operates on any gas pump—mechanical or electronic. And our software emphasis lets us connect our system without hard-wiring to pumps. That means existing equipment warranties are maintained.

Total Program Support

Q *POS systems today are very complicated—requiring interface with financial institutions and communications networks. How can the station owner gain the needed expertise?*

Expressway™ has the answers.

Expressway is the best POS system available because we anticipated the hard questions. And came up with the right answers. Now, to help you make the right POS decision for your stations, we've compiled the Expressway Q&A.

A We expect the service station owner to know his business: gasoline retailing. We know ours: POS systems. When you buy an Expressway system you're buying more than a hardware package. Your buying total POS support.

Q *What exactly does the Expressway support package include?*

A Everything you'll need to interface with multiple banks and communication networks. To authorize sales, to charge customer's accounts, to reconcile charges and receive settlements. Our broad experience provides credibility needed to be the vital link with your bank. Or we can also act as "matchmaker"—securing a bank commitment for your program.

Q *How much does all this support cost the station owner?*

A Not a cent. It's all part of the Expressway package. Knowing that our product was not complete without this interface capability, we hired the experts. We built an experience base that our customers can cash in on. With Expressway, there are no outside consultants to hire. We are there to provide total service.

Q *What about marketing? For those who are just initiating a credit or debit POS program, how do they go about attracting new customers?*

A Expressway can help. With market analyses to locate new customers and select pilot sites. With proven consumer activation programs to bring you new business.

Management Reporting and Cost Control

Q *With the cost of doing business steadily increasing, what real savings can be expected from POS?*

A We can reduce labor costs. By cutting back on extra attendant at peak periods. Or providing an unattended capability at off-hours. Also by pre-authorizing sales, Expressway eliminates the chargebacks you might anticipate from a card program. And other risks like drive-offs and fraud are substantially reduced.

Q *Is there anything that POS can do to increase service station efficiency?*

A Quite a lot. Expressway can provide you with what you need—automatically. From shift closes and reconciliations for every cash and charge sale to accurate, timely inventory summaries by product and price. Besides, think how the increase in throughput will cut unit cost.

More questions? Contact Gregory Kane, VP-Marketing, Expressway Systems Corporation, 575 Madison Avenue, Suite 1006, New York, NY 10022, telephone (212) 605-0360.

Really, there is only one question. What system can deliver the most sales, best support, easiest installation, tightest cost controls—all at a highly competitive price? The answer is Expressway.

EXPRESSWAY

EXPRESSWAY™

WHERE GASOLINE RETAILING IS GOING.

LP-Gas Sales Drop 6.5% in 1982

In 1982, sales of liquefied petroleum gases and ethane totaled 19.4-billion gal. (462.9 million bbl.), compared with the revised 1981 total of 20.8-billion gal. (495.3-million bbl.), a decrease of 6.5%.

The slump reflected continued conservation efforts and sluggish industrial activity. Sales fell off in all categories except internal combustion engine fuel use. And, 1981 totals also were revised upward, which didn't help matters.

LPG Sales Trend

Major Domestic Markets

(Add 000,000 gal.)

	Total U.S. sales		Residential-commercial		Chemical		Internal combustion		Industrial		All other uses	
Year	Vol.	% Change	Vol.	% Change	Vol.	% Change	Vol.	% Change	Vol.	% Change	Vol.	% Change
1982	19,441	-6.5%	4,047	-4.3%	9,679	-7.3%	644	16.2%	2,095	0.6%	2,976	-15.2%
1981 (a)	20,803	8.3	4,217	-11.5	10,438	27.9	554	24.8	2,083	-1.0	3,511	-5.8
1980	18,604	-3.1	4,373	-8.2	7,808	-4.3	508	14.4	2,217	5.3	3,698	-1.0
1979	19,202	27.8	4,764	-31.5	8,160	129.0	444	-55.3	2,105	57.1	3,728	71.6
1978	15,023	-3.1	6,954	-3.0	3,563	-0.4	993	-13.3	1,340	28.4	2,172	-15.6
1977	15,508	-3.2	7,169	-2.0	3,578	-12.4	1,145	-2.1	1,044	—	2,573	7.5
1976	16,013	5.3	7,313	4.2	4,085	-2.1	1,170	—	1,052	-2.8	2,394	35.8
1975	15,200	-6.8	7,020	-2.9	4,172	-23.0	1,162	-11.3	1,082	1.2	1,763	38.3
1974	16,306	-5.0	7,231	-7.8	5,422	-9.0	1,310	-7.0	1,069	2.4	1,275	46.2
1973	17,812	-1.1	7,846	-5.0	5,960	1.0	1,409	-4.7	1,095	-2.3	872	41.1
1972	17,373	12.1	8,253	7.6	5,898	15.1	1,479	11.7	1,124	23.7	618	30.7
1971	15,498	1.5	7,668	1.3	5,124	2.4	1,324	—	909	1.3	473	1.3
1970	15,271	26.6	7,569	41.6	5,003	24.8	1,336	11.9	897	32.1	467	125.6
1965	11,434	33.7	5,346	26.5	4,008	54.6	1,194	33.0	679	13.9	207	-23.0
1960	8,579	40.1	4,225	50.8	2,593	36.5	898	37.7	596	13.7	269	9.3
1955	6,123	75.8	2,801	38.5	1,899	122.6	652	401.5	524	241.6	246	-7.7
1950	3,433	—	2,022	—	853	—	130	—	217	—	260	—

(a) 1981 totals were revised in June 1983.

Source: Sales of LPG and Ethane in 1982, Petroleum Supply Annual, Energy Information Administration, June 1983.

BRITE IDEAS

Our signs sell gas and much more:

Self Serv
Regular/Gal
128.9
Lead Free/Gal
132.9
Diesel/Gal
123.9

- Internally illuminated
- U.L. listed
- Lexan faces
- 10" or 16" high, easy-to-change numbers
- Changeable product plates
- 3 to 4 foot widths
- 1, 2 or 3 product displays, *or fitted to your specifications*

CUSTOM SIGNS

Looking for more "brite ideas"? Contact us today for customizing logos and brand names into your station or convenience store signs.

CALL TOLL FREE

[redacted]

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An Investment Future

You can now become part of an exciting industry doing over $12 billion in retail sales. If you want a business of your own, have a net worth of at least $500,000 and a high degree of liquidity . . . you owe it to yourself to investigate the regional licensing opportunities of Convenient Food Mart stores.

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Convenient Food Mart
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Convenient Food Mart

56 FRANCHISORS SERVING OVER 1000 STORES!

Sales of Liquid Petroleum Gases, by Use

(Add 000 gal.)

	Residential and Commercial		Internal Combustion Fuel		Chemical Industrial		Gas Utility		Other		Total	
District and State	1982	1981	1982	1981	1982	1981	1982	1981	1982	1981	1982	1981
PAD District 1												
New England States												
Connecticut	28,493	29,214	1,674	1,641	14,826	12,089	3,030	6,205	2,344	2,797	50,367	51,946
Maine	19,948	17,049	900	W	8,402	8,425	W	W	W	1,205	29,744	27,778
Massachusetts	35,232	35,226	3,528	3,625	6,021	8,830	30,016	50,113	1,834	2,239	76,631	100,033
New Hampshire	29,487	28,980	644	631	5,756	5,694	10,681	11,779	250	203	46,818	47,287
Rhode Island	5,932	5,991	W	W	2,209	2,488	W	W	2,038	W	11,645	10,796
Vermont	20,570	18,816	433	W	2,635	W	6,405	W	567	362	30,610	24,324
Central Atlantic States												
Delaware	18,631	22,400	693	W	6,362	6,160	95	W	5,637	3,436	31,418	33,964
Maryland and District of Columbia	39,269	45,119	3,584	W	18,544	W	3,659	6,273	7,556	8,060	72,612	78,531
New Jersey	41,580	46,731	12,007	12,630	160,871	172,944	4,912	7,078	2,903	3,384	222,273	242,767
New York	123,589	131,813	10,189	9,977	26,321	45,940	3,853	4,486	9,316	10,570	173,268	202,786
Pennsylvania	87,817	90,290	15,685	14,672	136,527	165,668	285	11,307	14,375	14,983	254,689	296,920
Lower Atlantic States												
Florida	190,313	233,281	25,899	19,664	76,440	101,597	7,561	9,968	15,459	21,422	315,672	385,932
Georgia	137,303	163,710	14,725	13,264	19,088	20,838	4,797	5,944	50,257	61,178	226,170	264,934
North Carolina	124,569	137,573	10,464	8,726	22,590	30,663	3,180	5,956	85,819	110,022	246,622	292,940
South Carolina	64,461	77,126	W	4,371	7,485	8,818	W	1,869	14,734	17,694	92,587	109,878
Virginia	64,694	68,732	5,642	6,184	15,888	14,789	795	2,742	18,067	22,090	105,086	114,537
West Virginia	12,617	19,470	1,438	2,023	80,437	104,019	W	W	W	W	95,321	126,339
Total	**1,044,505**	**1,171,521**	**114,230**	**104,915**	**610,402**	**727,044**	**80,212**	**126,999**	**232,184**	**281,213**	**2,081,533**	**2,411,692**
PAD District 2												
Illinois	197,257	200,107	34,915	22,858	334,574	648,550	2,700	26,450	385,155	429,905	954,601	1,327,870
Indiana	141,947	162,859	W	W	42,154	51,774	W	W	44,757	55,297	242,551	281,985
Iowa	186,195	177,950	7,485	W	76,400	69,402	26,375	W	128,166	130,347	424,621	384,621
Kansas	79,480	80,603	17,318	14,972	253,224	122,194	11,043	4,993	63,356	66,489	424,421	289,251
Kentucky	75,188	92,446	20,080	W	151,419	203,842	180	W	5,792	6,116	252,659	308,135
Michigan	161,887	146,298	19,619	W	35,458	22,100	7,167	W	28,337	27,981	252,468	216,690
Minnesota	139,132	131,737	9,058	9,348	31,909	21,993	12,097	1,324	73,938	67,227	266,134	231,629
Missouri	238,363	229,979	8,550	W	11,946	15,697	36,122	W	22,794	31,818	317,775	287,403
Nebraska	71,001	64,805	12,576	13,124	W	4,851	W	—	77,788	73,676	170,100	156,456
North Dakota	18,555	32,268	11,760	7,535	1,245	W	3,483	W	16,323	10,116	51,366	56,441
Ohio	130,446	137,388	25,022	W	279,106	256,944	290	W	1,014,260	1,125,896	1,449,124	1,543,384
Oklahoma	107,576	93,276	30,362	20,798	93,160	66,675	715	56,933	54,971	40,172	286,784	277,854
South Dakota	46,792	45,803	3,937	3,410	W	W	W	W	26,075	18,942	79,255	69,192
Tennessee	53,643	37,922	11,140	5,647	9,350	8,465	497	727	7,035	6,153	81,665	58,914
Wisconsin	138,860	133,640	W	11,972	19,213	10,078	W	183	37,185	35,900	210,083	191,773
Total	**1,786,322**	**1,767,081**	**234,688**	**182,149**	**1,348,681**	**1,506,580**	**107,984**	**97,753**	**1,985,932**	**2,126,035**	**5,463,607**	**5,681,588**
PAD District 3												
Alabama	113,286	132,590	11,903	8,257	W	W	W	W	23,481	25,820	157,161	177,840
Arkansas	81,696	85,923	23,665	13,587	W	W	W	W	31,472	35,072	145,002	146,331
Louisiana	42,263	56,627	18,127	W	3,057,722	2,792,738	W	W	W	W	3,142,468	2,869,293
Mississippi	96,299	103,297	18,785	W	13,093	25,195	408	W	28,585	30,742	159,170	176,603
New Mexico	53,248	40,534	6,460	7,831	20,284	54,560	W	W	W	W	96,625	121,314
Texas	233,684	308,587	86,839	85,939	6,404,755	7,016,694	11,922	125,127	200,700	409,065	6,937,900	7,945,412
Total	**622,476**	**727,558**	**165,779**	**140,380**	**9,510,743**	**9,909,836**	**31,056**	**138,904**	**308,272**	**520,115**	**10,638,326**	**11,436,793**
PAD District 4												
Colorado	111,913	101,950	5,305	6,511	10,587	13,099	21,660	9,023	14,598	13,885	164,063	144,468
Idaho	16,061	14,414	W	W	4,994	3,952	W	W	5,370	4,929	36,597	34,173
Montana	36,369	24,878	W	3,278	4,886	1,880	W	5,847	6,243	4,047	51,357	39,930
Utah	21,235	18,972	6,197	W	3,651	10,835	15,968	W	7,045	16,159	54,096	60,104
Wyoming	40,616	35,547	9,386	7,400	9,457	11,708	19,411	10,404	11,736	13,791	90,606	78,850
Total	**226,194**	**195,761**	**28,433**	**23,410**	**33,675**	**41,474**	**63,525**	**44,069**	**44,992**	**52,811**	**396,719**	**357,525**
PAD District 5												
Alaska	W	W	W	—	2,478	2,428	—	—	W	W	7,544	5,900
Arizona	W	31,308	8,239	9,149	W	W	W	W	4,633	5,962	58,800	49,706
California	219,239	217,002	71,294	67,749	214,216	298,804	14,257	23,125	58,968	59,179	577,974	665,859
Hawaii	18,911	W	W	W	W	W	W	W	W	4,786	74,729	51,993
Nevada	22,124	19,950	1,559	W	3,557	2,408	W	W	W	W	34,669	32,488
Oregon	30,196	31,078	5,357	8,782	5,469	W	W	W	W	5,772	46,973	48,966
Washington	34,199	33,584	11,108	13,147	8,731	6,850	W	W	W	W	60,615	60,850
Total	**367,623**	**355,009**	**100,816**	**103,055**	**270,743**	**334,869**	**35,620**	**38,737**	**86,502**	**84,092**	**861,304**	**915,762**
U.S. Total	**4,047,120**	**4,216,930**	**643,946**	**553,909**	**11,774,144**	**12,521,803**	**318,397**	**446,462**	**2,657,882**	**3,064,266**	**19,441,489**	**20,803,370**

Source: Energy Information Administration, Petroleum Supply Annual, June 1983.

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Today America needs an oil this good: Quaker State.

Four generations of American motorists have entrusted their cars to Quaker State protection. And we will not belie that trust. Quaker State's leading consumer motor oils are refined from choice 100% Pennsylvania Grade Crude Oil. That's a lot of peace of mind for the 25 million motorists who rely on the goodness of our motor oils.

QUAKER STATE OIL REFINING CORPORATION
Oil City, Pennsylvania

Motor Oil Outlook: A 1983 Review

Do-it-yourselfers continued to dominate the motor oil market in 1983, with seven out of 10 quarts purchased as carry outs.

NPD Auto-Facts, of Houston, Texas, notes, however, that there was a minor slippage in the do-it-yourselfers' share of purchases last year. In 1982, carry-out volume was at the 71% level, and in 1983, it declined 1% to 70%.

Mass merchandisers generally had motor oils available for $1.06 per quart, up only 1¢ over 1982. But service station refills and changes averaged $1.65 per quart, an increase of 6¢ over 1982. Thus, not only did the consumer price go up higher at service stations but also the spread exceeded 35% in cost.

The average family in the NPD survey spent $15.76 on motor oils in 1983, a bit less than the year before. The average family also used a bit less motor oil in 1983—about a half-quart. This factor has been decreasing right along, probably reflecting better quality and longer-life motor oils which require fewer additions and extend change intervals.

Service stations continued to lose ground in 1983 as a source of motor oil purchases. The NPD Survey shows that the service station share of market declined to 18% in 1983, down 3% from 1982 and 5% from 1981. Picking up their "lost" business were car dealers, auto supply stores, garages and tire stores, whose share rose from 19% in 1981 to 20% in 1982 and to 23% in 1983.

NPD Auto-Facts uses a diary track methodology in its surveys and the figures reflect purchases by family households. NPD Auto-Facts, which has offices in Houston, New York, Chicago and Los Angeles, estimates that families purchase 50% to 60% of the motor oil bought for passenger cars and light trucks.

The Market Share Battle

	Avg. Retail Price			Market Shares	
Retail Segment	**1983**	**1982**	**Primary Market**	**1983**	**1982**
Mass Merchandisers (discount stores, department stores, supermarkets, drug stores and others)	$1.06	$1.05	DIY (a)	59%	59%
Service Stations	1.65	1.59	Reliers (b)	18	21
Other Traditional Outlets (car dealers, auto supply stores, garages and tire stores)	1.30	1.36	Reliers & DIY	23	20
Total Industry	**$1.21**	**$1.22**			

(a) Do-it-yourselfers accounted for 70% of the motor oil purchases in 1983; (b) Motorists who rely on service stations, car dealers, etc., to change their oil.

The Channels of Distribution (a)

	1983	1982	1981	1980
Service Stations	NA	20.8%	23.4%	25.7%
Discount Stores	NA	30.1	29.2	29.3
Department Stores	NA	10.0	7.6	8.2
Supermarket/Drug Stores	NA	9.2	9.3	8.6
Others	NA	10.1	11.3	10.1
Auto Supply Stores	NA	9.8	10.5	9.7
Tire Store/Garages	NA	5.2	4.3	5.3
Car Dealers	NA	4.8	4.4	3.1

(a) By quarts by place of purchase

How the Oil Is Used

	1983	1982	1981	1980
Oil Change	49%	48%	46%	45%
Add Oil	17	18	20	20
Future Use	15	13	14	16
Duplicate Use	19	21	20	19

Who Buys the Most of It

	1983	1982	1981	1980
Carried Out by Purchaser (installed at some other place (a)	70%	71%	70%	69%
Installed Where Bought (b)	30	29	30	31

(a) Generally considered to be the do-it-yourselfer; (b) generally considered to be the "relier," i.e., depending on service man for performance.

Dollars Spent per Average Family

	1983	1982	1981	1980
Dollars Spent	$15.76	$16.56	$17.10	$16.91
Average Price Paid per Quart	1.21	1.22	1.17	1.08
Average Quarts per Transaction	4.30	4.10	4.10	4.40
Annual Quarts Purchased	13.00	13.60	14.70	15.70

Source: The Petroleum Marketing Index (NPD Research, Inc.), May 1984

Lube Oil Sales Projections

U.S. Demand for Automotive Lube Base Oils

Year	(Add 000,000)				
	Engine Oils	Hydraulic Oils	Other Lubes	Total	Total
1990	923	187	48	1,158	27.6
1985	933	174	45	1,152	27.4
1984	924	172	44	1,140	27.1
1983	896	170	43	1,109	26.4
1982	884	164	40	1,088	25.9
1981	905	165	44	1,114	26.5

Source: Jon S. Helman, Sun Refining & Marketing Company, May 1984

U.S. Demand for Lubricating Base Oils

Year	(Add 000,000)				
	Total	Automotive Lubes	Industrial Lubes	Process Oils	Losses/ Minor Prod.
1990	59.0	27.6	19.3	8.4	3.7
1985	55.9	27.4	18.2	6.8	3.5
1984	54.4	27.1	17.1	6.7	3.5
1983	51.9	26.4	15.9	6.2	3.4
1982	50.8	25.9	15.6	6.0	3.3
1981	55.8	26.5	18.6	7.1	3.6

Source: Jon S. Helman, Sun Refining & Marketing Company, May 1984

Past and Projected Demand for Finished Lubes

Automotive	(Millions of gal.)				
	1982	1983	1984	1985	1990
On-Road Engine Oil	783	795	808	821	782
Off-Road Engine Oil	221	223	234	239	267
Hydraulic Oil	186	193	195	198	212
Gear Oil	46	49	50	51	54
Total Automotive	**1,236**	**1,260**	**1,287**	**1,309**	**1,315**

Industrial Oils	(Millions of gal.)				
	1982	1983	1984	1985	1990
General Lubes	393	401	428	457	484
Metalworking Oil	154	155	172	190	198
Industrial Engine Oil	134	135	142	148	160
Process Oil	261	270	290	295	365
Total Industrial	**942**	**961**	**1,032**	**1,090**	**1,207**
Total Lubes	**2,178**	**2,221**	**2,319**	**2,386**	**2,522**

Source: Jon S. Helman, Sun Refining & Marketing Company, May 1984

Automotive Sales

	(Add 000 Gallons)	
	1982	1981
SAE J-193a. Engine Oils		
Monograded	425,450	479,099
Multi-graded	530,946	506,593
Sub Total	**956,396**	**985,692**
Non SAE J-183a. Engine Oils		
Aircraft	9,227	11,119
Gasoline Fueled Two-stroke	11,735	11,915
Sub Total	**20,962**	**23,034**
Transmission and Hydraulic Fluids		
Automatic Trans. Fluids	126,727	128,187
Universal Fractor Fluids	42,726	40,078
Shock Absorber Steering Fluid	8,108	8,944
Other (Manual Trans., etc.)	2,780	3,883
Sub Total	**180,341**	**181,092**
Gear Lubricants		
GL-4 Less	4,531	6,410
GL-5 and GL-6	40,165	43,812
Sub Total	**44,696**	**50,222**
Total Automotive	**1,202,395**	**1,240,040**

Source: National Petroleum Refiners Association (NPRA) *"1982 Report on U.S. Lubricating Oil Sales"*

Industrial Sales

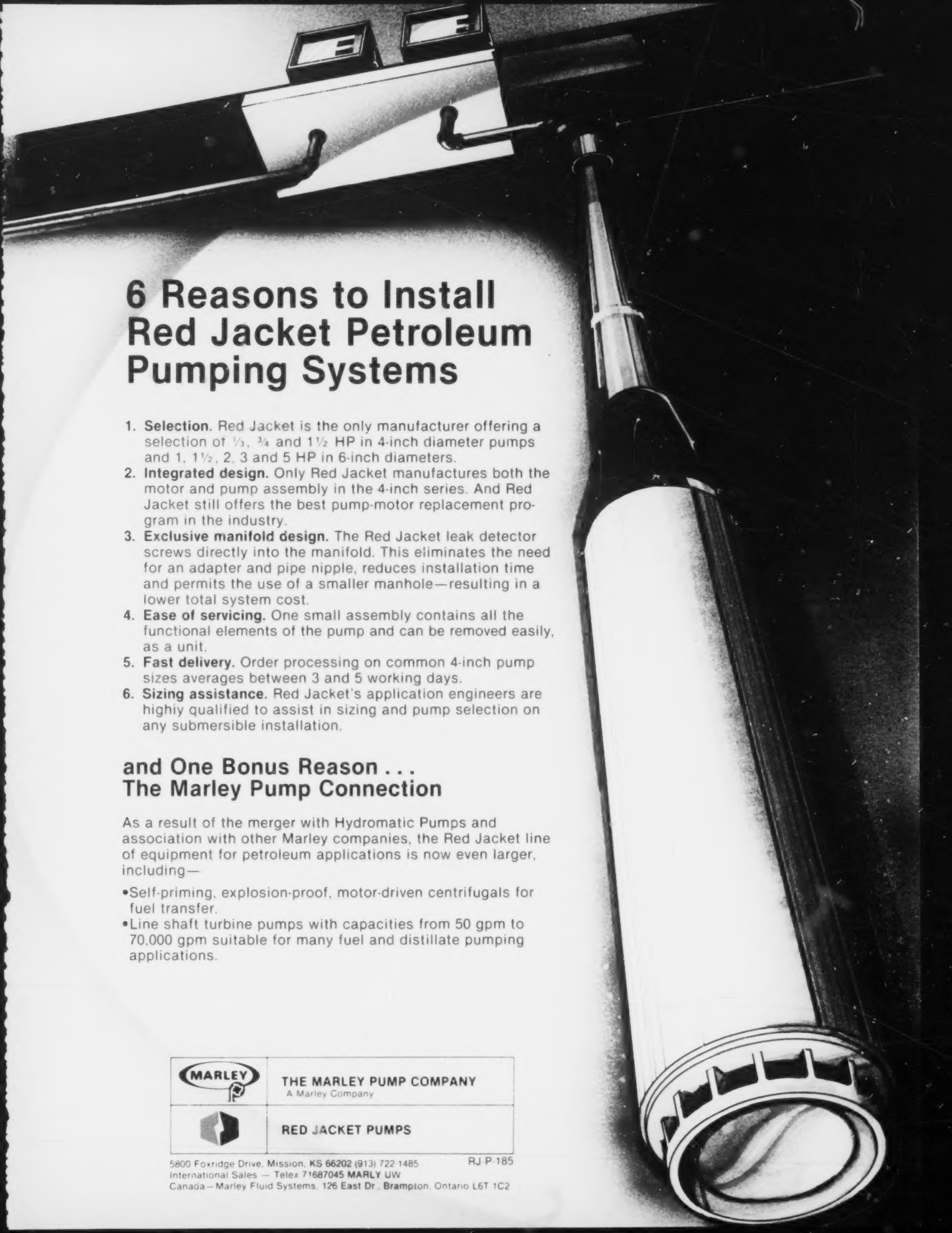
	(Add 000 Gallons)	
	1982	1981
General Industrial Lubricants		
Hydraulic Oils	181,096	215,223
Gear Oils	32,337	38,825
Other Specified	119,906	152,458
Other Unspecified	1,199	3,201
Sub Total	**333,730**	**409,707**
Industrial Engine Oils		
Railroad Diesel	50,043	58,368
Marine	42,691	51,157
Natural Gas	41,221	42,361
Sub Total	**133,955**	**151,886**
Metalworking		
Specified	74,813	87,804
Unspecified	2,495	2,034
Sub Total	**77,308**	**89,838**
Process Oils		
Specified	248,536	290,887
Total Industrial	**793,529**	**942,318**

Source: National Petroleum Refiners Association (NPRA) *1982 Report on U.S. Lubricating Oil Sales*

Total Industrial & Automotive Lube Sales

	(Add 000 gal.)		
	1982	1981	1980
Total Industrial Lube Sales	**793,529**	**942,318**	**958,849**
Total Automotive Lube Sales	**1,202,395**	**1,240,040**	**1,265,316**
GRAND TOTAL	**1,995,924**	**2,182,358**	**2,224,165**

Source: National Petroleum Refiners Association *"1982 Report on U.S. Lubricating Oil Sales"*



6 Reasons to Install Red Jacket Petroleum Pumping Systems

1. **Selection.** Red Jacket is the only manufacturer offering a selection of ⅓, ¾ and 1½ HP in 4-inch diameter pumps and 1, 1½, 2, 3 and 5 HP in 6-inch diameters.
2. **Integrated design.** Only Red Jacket manufactures both the motor and pump assembly in the 4-inch series. And Red Jacket still offers the best pump-motor replacement program in the industry.
3. **Exclusive manifold design.** The Red Jacket leak detector screws directly into the manifold. This eliminates the need for an adapter and pipe nipple, reduces installation time and permits the use of a smaller manhole—resulting in a lower total system cost.
4. **Ease of servicing.** One small assembly contains all the functional elements of the pump and can be removed easily, as a unit.
5. **Fast delivery.** Order processing on common 4-inch pump sizes averages between 3 and 5 working days.
6. **Sizing assistance.** Red Jacket's application engineers are highly qualified to assist in sizing and pump selection on any submersible installation.

and One Bonus Reason . . . The Marley Pump Connection

As a result of the merger with Hydromatic Pumps and association with other Marley companies, the Red Jacket line of equipment for petroleum applications is now even larger, including—

- Self-priming, explosion-proof, motor-driven centrifugals for fuel transfer.
- Line shaft turbine pumps with capacities from 50 gpm to 70,000 gpm suitable for many fuel and distillate pumping applications.

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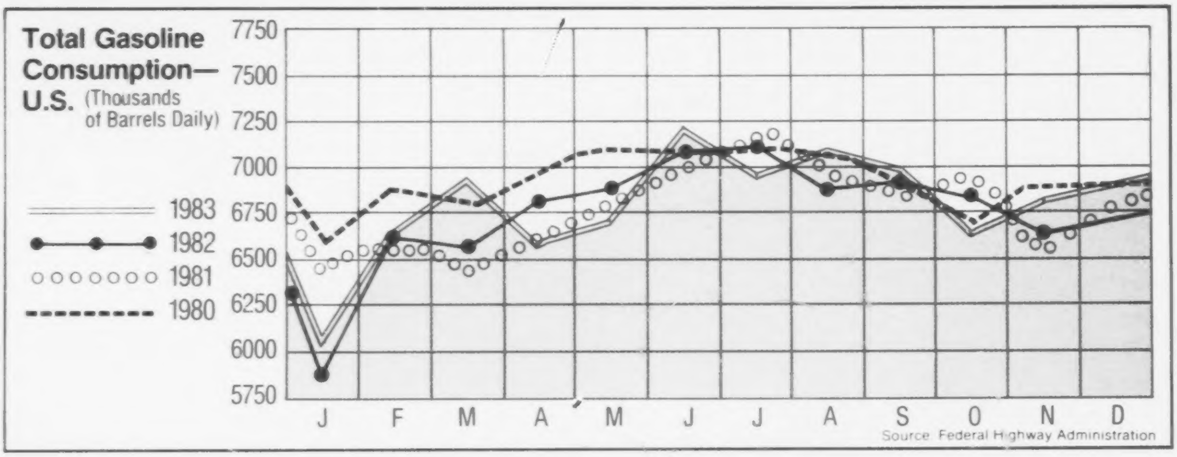
RJ-P-185



Total Gasoline Consumption—U.S. (Thousands of Barrels Daily)

Source: Federal Highway Administration

Gasoline Consumption by States

(Includes consumption on-highway, off-highway, and other uses.)

	1983 Rank	(Add 000 gal.) 1983 (a)	(Add 000 gal.) 1982 (b)	% Chng. '83 v. '82
Alabama	23	1,861,406	1,840,396	1.1%
Alaska	50	221,229	235,112	-8.9
Arizona	27	1,410,904	1,341,613	5.2
Arkansas	33	1,128,357	1,123,466	0.4
California	1	11,032,662	10,660,534	3.5
Colorado	25	1,544,737	1,513,235	2.9
Connecticut	29	1,308,077	1,284,966	1.8
Delaware	48	308,772	282,462	9.3
District of Columbia	51	168,802	170,518	-1.0
Florida	4	5,078,234	4,900,197	3.6
Georgia	11	2,904,369	2,818,366	2.1
Hawaii	46	355,332	349,098	1.8
Idaho	41	459,377	456,063	0.7
Illinois	6	4,609,220	4,522,361	1.9
Indiana	14	2,479,277	2,431,388	2.6
Iowa	28	1,394,699	1,420,817	-1.8
Kansas	30	1,240,248	1,236,159	0.3
Kentucky	24	1,734,296	1,721,620	0.7
Louisiana	17	2,151,035	2,145,094	0.2
Maine	38	515,891	505,620	2.8
Maryland	22	1,892,434	1,888,873	0.2
Massachusetts	16	2,266,746	2,235,986	1.4
Michigan	8	3,680,884	3,795,814	-2.0
Minnesota	19	1,985,492	1,931,205	2.8
Mississippi	32	1,158,134	1,151,872	0.5
Missouri	13	2,529,042	2,494,873	1.4
Montana	40	459,851	452,371	1.7
Nebraska	35	776,930	792,579	-2.0
Nevada	39	489,835	490,270	-0.1
New Hampshire	44	408,586	393,276	3.9
New Jersey	9	3,371,871	3,371,871	6.3
New Mexico	36	740,916	744,599	-0.5
New York	3	5,491,074	5,617,353	-2.2
North Carolina	10	2,911,221	2,842,968	2.4
North Dakota	43	390,085	403,067	-3.2
Ohio	5	4,649,742	4,561,134	1.9
Oklahoma	21	1,907,622	1,929,207	-1.1
Oregon	31	1,222,903	1,211,110	1.0
Pennsylvania	7	4,370,547	4,384,130	-0.4
Rhode Island	45	365,634	360,833	1.3
South Carolina	26	1,539,188	1,515,808	1.5
South Dakota	42	389,412	393,021	-0.9
Tennessee	15	2,331,655	2,355,395	-1.0
Texas	2	8,393,680	8,201,687	2.3
Utah	37	725,317	734,020	-1.2
Vermont	49	242,056	236,905	2.2
Virginia	12	2,554,245	2,493,638	2.4
Washington	20	1,919,152	1,851,127	3.7
West Virginia	34	801,736	810,848	-1.1
Wisconsin	18	2,011,843	1,982,060	1.5
Wyoming	47	338,752	359,425	-5.8
Total U.S.	—	**104,240,610**	**102,747,065**	**1.5%**

(a) Preliminary; (b) Revised and final.
Source: Federal Highway Administration, Monthly Reports.

. . . and by Types of Vehicles

	Passenger Vehicles						
		Buses					
	Cars and Motorcycles	Commercial	School	All Buses	Total Passenger	Trucks and Combinations	All Motor Vehicles
Fuel consumed (million gal.)	69,730 (a)	721	399	1,120	70,850	42,534	113,383
Average per vehicle (gal.)	539 (b)	6,356	894	2,003	545	1,207	686
Average miles per gal.	16.48 (c)	4.96	7.68	5.93	16.31	10.27	14.05
Vehicles registered (thousands)	129,441 (d)	114	446	559	130,000	35,253	165,253
Average miles traveled	8,876 (e)	31,524	6,870	11,872	8,889	12,395	9,637
Average miles traveled (millions):							
Main rural roads	277,050	787	798	1,585	278,635	133,609	412,224
Local rural roads	186,317	461	1,021	1,482	187,799	90,642	278,441
Urban streets	685,516	2,303	1,176	3,572	689,088	212,708	901,796
Total travel 1982 (f)	**1,148,883**	**3,577**	**3,062**	**6,639**	**1,155,522**	**436,959**	**1,592,481**
Total travel 1981 (g)	**1,124,843**	**3,541**	**2,960**	**6,501**	**1,131,344**	**425,127**	**1,556,471**

(a) Includes 69,430,000,000 for passenger cars and 300,000,000 for motorcycles; (b) 561 for passenger cars and 52 for motorcycles; (c) 16.33 for passenger cars and 50.00 for motorcycles; (d) 123,697,863 for passenger cars and 5,743,463 for motorcycles; (e) 9,167 for passenger cars and 2,612 for motorcycles; (f) includes 1,133,883,000 for passenger cars and 15,000,000 for motorcycles; (g) includes 1,109,843,000 for passenger cars and 15,000,000 for motorcycles.
Source: Federal Highway Administration, Table 5582-14 (VM-), October 1983.

State Gasoline Consumption by Rank

	1983 Rank	1982 Rank	(Add 000 gal.) 1983 Total
California	1	1	11,032,662
Texas	2	2	8,393,680
New York	3	3	—
Florida	4	4	5,078,234
Ohio	5	6	4,649,742
Illinois	6	5	4,609,320
Pennsylvania	7	7	4,370,547
Michigan	8	8	3,680,884
New Jersey	9	9	3,371,871
North Carolina	10	10	2,911,221
Georgia	11	11	2,904,369
Virginia	12	13	2,554,245
Missouri	13	12	2,529,042
Indiana	14	14	2,479,277
Tennessee	15	15	2,331,655
Massachusetts	16	16	2,266,746
Louisiana	17	17	2,151,035
Wisconsin	18	18	2,011,843
Minnesota	19	19	1,985,492
Washington	20	22	1,919,152
Oklahoma	21	20	1,907,622
Maryland	22	21	1,892,434
Alabama	23	23	1,861,406
Kentucky	24	24	1,734,296
Colorado	25	26	1,544,737
South Carolina	26	25	1,539,188

	1983 Rank	1982 Rank	(Add 000 gal.) 1983 Total
Arizona	27	28	1,410,904
Iowa	28	27	1,394,699
Connecticut	29	30	1,308,077
Kansas	30	30	1,204,200
Oregon	31	31	1,222,903
Mississippi	32	32	1,158,134
Arkansas	33	33	1,128,357
West Virginia	34	34	801,736
Nebraska	35	36	776,930
New Mexico	36	37	740,916
Utah	37	35	725,317
Maine	38	38	515,891
Nevada	39	39	489,835
Montana	40	41	459,851
Idaho	41	40	459,377
South Dakota	42	43	389,412
North Dakota	43	42	390,085
New Hampshire	44	44	408,586
Rhode Island	45	45	365,634
Hawaii	46	47	355,332
Wyoming	47	46	338,752
Delaware	48	48	308,772
Vermont	49	49	240,056
Alaska	50	50	221,229
District of Columbia	51	51	168,802

Source: Federal Highway Administration, Monthly Reports

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Gasoline Octanes, U.S. Service Stations

		Regular grade (1)			Premium grade (2)			Unleaded grade		
Year	Season	Rsh.	Mtr.	(R + M)* / 2	Rsh.	Mtr.	(R + M)* / 2	Rsh.	Mtr.	(R + M)* / 2
1983	Summer	93.1	84.9	89.0	—	—	—	92.0(a) 96.2(b)	82.9(a) 86.5(b)	87.5(a) 91.4(b)
1982-83	Winter	92.9	85.2	89.1	—	—	—	91.7(a) 96.3(b)	82.9(a) 86.7(b)	87.3(a) 91.5(b)
1982	Summer	93.0	85.0	89.0	—	—	—	91.9(a) 96.8(b)	82.8(a) 86.6(b)	87.3(a) 91.7(b)
1981-82	Winter	92.7	85.1	88.9	98.1	87.8	93.0	91.8(a) 96.6(b)	82.9(a) 86.8(b)	87.4(a) 91.7(b)
1981	Summer	92.8	85.1	89.0	—	—	—	91.9(a) 96.3(b)	83.0(a) 86.2(b)	87.4(a) 91.3(b)
1980-81	Winter	92.8	85.4	89.1	97.3	89.2	93.3	91.9(a) 96.1(b)	83.3(a) 86.5(b)	87.6(a) 91.4(b)
1980	Summer	96.2	85.2	88.9	97.0	88.6	92.8	92.1(a) 96.1(b)	83.4(a) 86.4(b)	87.8(a) 91.6(b)
1979-80	Winter	92.5	85.5	89.0	97.2	89.3	93.2	92.1(a) 97.1(b)	83.7(a) 87.0(b)	87.9(a) 92.1(b)
1979	Summer	92.8	85.7	89.3	97.6	89.8	93.7	93.0	84.1	88.6
1978-79	Winter	93.2	85.9	89.6	98.0	90.3	94.2	93.1	84.3	88.7
1978	Summer	93.2	85.7	89.5	98.2	90.4	94.3	93.0	83.9	88.5
1977-78	Winter	93.2	85.7	89.5	98.8	91.0	94.9	92.9	83.9	88.4
1977	Summer	93.2	85.9	89.6	98.7	91.2	95.0	92.9	83.9	88.5
1976-77	Winter	93.2	86.1	89.7	98.8	91.4	95.1	92.6	84.1	88.4
1976	Summer	93.3	86.0	89.6	98.9	91.4	95.2	92.4	83.9	88.2
1975-76	Winter	93.4	86.0	89.7	98.9	91.4	95.2	92.3	84.0	88.2
1975	Summer	93.4	86.0	89.7	98.9	91.4	95.2	92.1	83.9	88.0
1974-75	Winter	93.4	86.1	89.9	98.9	91.6	95.3	92.3	84.0	88.2

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*Antiknock index

(1) Below 93.0 octane. (2) 93.0 octane and above.

(a) Unleaded antiknock (octane) index data below 90. (b) Unleaded antiknock (octane) index data 90 and above.

Source: Motor Gasolines, Summer 1983—National Institute for Petroleum and Energy Research, Bartlesville, OK, April 1984

Octane Numbers Flatten Out

It was almost a Mexican standoff in the variation of octane numbers between the summer of 1982 and the summer of 1983, according to National Institute for Petroleum and Energy Research, which took over the study series previously handled by the Bartlesville, Okla., Energy Technology Center.

Unleaded gasolines below 90-octane rose slightly—from 87.3-octane in the summer of 1982 to 87.5 in the summer of 1983. At the same time, the octane number for unleaded gasolines above 90 dropped from 91.7 in 1982 to 91.4 in 1983. Leaded regular gasolines showed no change in octane averages.

	Unleaded Octane Number						Leaded Octane Number (a)					
	Index Below 90			Index Above 90			Index Below 93			Index Above 93		
	Rsch.	Mtr.	(R + M) ÷ 2	Rsch.	Mtr.	(R + M) ÷ 2	Rsch.	Mtr.	(R + M) ÷ 2	Rsch.	Mtr.	(R + M) ÷ 2
Northeast	92.1	82.7	87.4	96.6	86.6	91.6	93.7	84.9	89.4	—	—	—
Mid-Atlantic Coast	92.3	82.7	87.5	96.8	86.4	91.6	93.4	85.0	89.2	—	—	—
Southeast	92.1	82.7	87.4	96.5	86.6	91.5	93.4	85.2	89.3	—	—	—
Appalachian	91.8	82.8	87.3	96.1	86.4	91.3	93.1	85.4	89.3	—	—	—
Michigan	91.4	82.9	87.2	95.9	86.4	91.2	93.6	85.8	89.7	—	—	—
North Illinois	91.6	83.2	87.4	95.5	87.4	91.5	92.8	85.3	89.1	—	—	—
Central Mississippi	92.2	82.9	87.6	95.9	86.7	91.3	93.6	85.2	89.4	—	—	—
Lower Mississippi	92.3	82.7	87.5	96.7	86.6	91.7	93.0	85.2	89.1	—	—	—
North Plains	92.1	83.5	87.8	96.8	87.6	92.2	92.0	83.8	88.0	—	—	—
Central Plains	91.8	83.1	87.4	95.6	85.4	90.5	93.3	84.9	89.1	—	—	—
South Plains	92.0	82.7	87.4	95.6	86.3	91.0	92.6	84.7	88.7	—	—	—
South Texas	92.1	82.8	87.5	96.7	86.5	91.6	93.1	85.5	89.3	—	—	—
South Mountain States	91.0	82.4	86.7	96.5	85.9	91.2	92.0	84.1	88.1	—	—	—
North Mountain States	90.8	82.7	86.8	94.4	86.4	90.4	92.6	83.4	88.1	—	-	—
Pacific Northwest	92.1	83.2	87.7	96.1	86.6	91.4	93.1	85.0	89.1	—	—	—
North California	92.9	83.3	88.1	97.0	86.1	91.5	93.5	85.1	89.3	—	—	—
South California	93.1	83.1	88.2	96.8	86.3	91.6	93.9	85.0	89.5	—	—	—
Average												
Summer 1983	**92.0**	**82.9**	**87.5**	**96.2**	**86.5**	**91.4**	**93.1**	**84.9**	**89.0**	—	—	—
Summer 1982	**91.9**	**82.8**	**87.3**	**96.8**	**86.6**	**91.7**	**93.0**	**85.0**	**89.0**	—	—	—

(a) In 1981, DOE began two classifications for leaded gasoline—below 93 octane and above 93 octane. However, nothing has been published in the above 93 octane since the winter of 1981-82.

Source: National Institute for Petroleum and Energy Research, which succeeded DOE's Bartlesville (Okla.) Energy Technology Center in this project, "Motor Gasolines, Summer 1983."

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Gasohol Consumption by States—1982

The following table was prepared by the Federal Highway Administration and contains a variety of caveats, as follows: the table shows gross gallons of gasohol reported by the distributors in each state. However, this total must not be considered a national total. In states where gasohol is taxed at the same rate as gasoline, the gallonage data are not reported separately and are commingled with gasoline data. In other states, however, partial tax exemptions have been legislated but the reporting systems have not yet been converted for separate reporting. In any case, the totals on the state should be considered minimums and not maximums for states and the nation as a whole.

(Add 000 gal.)

State	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Alabama	**927**	**1,120**	**961**	**902**	**1,133**	**894**	**909**	**813**	**806**	**1,114**	**748**	**1,194**	**11,521**
Alaska	—	—	—	—	—	—	—	—	—	—	—	—	—
Arizona	**693**	**185**	—	**848**	**1,007**	**787**	**344**	**206**	**246**	**184**	**262**	**334**	**5,096**
Arkansas	**184**	**824**	**786**	**698**	**755**	**666**	**743**	**755**	**683**	**716**	**974**	**678**	**8,462**
California	22.200	23.447	30.175	28.404	32.125	29.892	44.622	52.867	51.343	43.760	46.705	58.464	464.004
Colorado	2.122	2.128	2.134	2.097	2.026	199	2.787	845	455	2.916	3.191	3.090	23.990
Connecticut	441	436	427	335	328	422	359	351	372	355	264	371	4.461
Delaware	—	—	—	—	—	—	—	—	—	—	—	—	—
Dist. of Col.	—	—	**4**	**5**	—	—	**6**	**8**	—	**2**	**4**	**5**	**34**
Florida	**4,975**	**6,507**	**8,343**	**7,660**	**8,781**	**5,835**	**7,288**	**7,790**	**8,318**	**11,629**	**11,848**	**14,079**	**103,053**
Georgia	**14**	**24**	**24**	**1**	**19**	**4**	**4**	**2**	**2**	**8**	**20**	**26**	**148**
Hawaii	**81**	**75**	**82**	**67**	**63**	—	—	—	—	—	—	—	**368**
Idaho	—	—	—	—	—	—	—	549	509	453	478	475	2.464
Illinois	—	—	—	—	—	—	—	—	—	—	—	—	—
Indiana	2.624	2.220	2.753	4.690	3.208	5.516	13.624	12.213	16.328	18.116	19.268	20.009	120.569
Iowa	29.299	34.001	41.666	44.389	42.387	43.704	45.218	44.757	41.756	44.421	43.904	43.134	498.636
Kansas	**738**	**693**	**619**	**614**	**583**	**550**	**551**	**588**	**588**	**571**	**680**	**673**	**7,448**
Kentucky	**472**	**202**	**161**	**232**	**216**	**230**	**1,273**	**294**	**1,298**	**5,756**	**477**	**8,261**	**18,872**
Louisiana	—	—	—	—	—	—	—	—	—	—	—	—	—
Maine	—	—	—	—	—	—	—	—	—	—	—	—	—
Maryland	8	12	10	8	10	9	—	16	12	—	15	7	107
Massachusetts	24	26	14	31	34	18	27	25	24	26	22	19	290
Michigan	7.732	6.913	10.192	9.027	7.735	11.374	13.907	20.404	21.775	39.605	26.218	31.912	206.794
Minnesota	524	67	181	443	208	271	165	204	468	516	860	746	4.653
Mississippi	—	—	—	—	—	—	—	—	—	—	—	—	—
Missouri	—	—	—	—	—	—	—	—	—	—	—	—	—
Montana	**162**	**233**	**252**	**508**	**987**	**1,286**	**1,261**	**1,213**	**843**	**1,023**	**1,208**	**1,194**	**10,170**
Nebraska	**3,637**	**4,016**	**4,817**	**4,762**	**4,647**	**6,180**	**7,279**	**9,254**	**10,454**	**11,030**	**11,404**	**12,218**	**89,698**
Nevada	98	93	93	89	81	84	88	76	65	68	75	54	964
New Hampshire	—	—	—	—	—	—	—	—	—	—	—	—	—
New Jersey	—	—	—	—	—	—	—	—	—	—	—	—	—
New Mexico	50	108	91	84	79	96	97	92	94	90	94	107	1,082
New York	—	—	—	—	—	—	—	—	—	—	—	—	—
North Carolina	**587**	**670**	**687**	**680**	**620**	**679**	**753**	**560**	**494**	**587**	**604**	**535**	**7,456**
North Dakota	**830**	**716**	**474**	**647**	**455**	**462**	**537**	**439**	**525**	**224**	**634**	**556**	**6,499**
Ohio	**2,202**	**1,909**	**1,404**	**1,038**	**897**	**1,712**	**3,165**	**5,115**	**8,195**	**19,986**	**19,304**	**26,752**	**91,679**
Oklahoma	2.781	7.222	5.300	4.993	6.679	8.017	13.124	17.643	23.308	19.638	21.536	24.812	155.053
Oregon	144	150	168	169	190	188	188	192	178	174	164	168	2.073
Pennsylvania	—	—	—	—	—	—	—	—	—	—	—	—	—
Rhode Island	22	—	—	—	—	—	—	—	—	—	—	—	22
South Carolina	**1,605**	**1,493**	**1,844**	**2,047**	**1,816**	**1,983**	**3,752**	**5,833**	**7,342**	**8,814**	**12,101**	**11,058**	**59,688**
South Dakota	**469**	**431**	**322**	**905**	**998**	**975**	**1,044**	**1,083**	**1,678**	**2,123**	**1,874**	**1,686**	**13,808**
Tennessee	—	—	—	—	—	—	—	—	—	—	—	—	—
Texas	**383**	**410**	**540**	**543**	**559**	**488**	**1,316**	**1,963**	**3,581**	**6,580**	**7,437**	**14,342**	**38,142**
Utah	—	—	—	—	—	—	—	—	—	—	—	500	500
Vermont	—	—	—	—	—	—	—	—	—	—	—	—	—
Virginia	778	2.644	1.562	1.854	2.184	2.845	3.323	2.550	2.774	3.783	3.776	2.761	30.834
Washington	266	911	482	471	387	363	516	811	1.232	682	838	271	7.230
West Virginia	—	—	—	—	—	—	—	—	—	—	—	—	—
Wisconsin	**307**	**455**	**174**	**222**	**204**	**145**	**89**	**334**	**149**	**186**	**213**	**240**	**2,718**
Wyoming	**46**	**36**	**35**	**22**	**25**	**17**	**16**	**15**	**10**	**13**	**13**	**11**	**259**
Total	**87.445**	**100.377**	**116.977**	**119.485**	**121.426**	**125.891**	**168.375**	**189.860**	**205.905**	**245.149**	**237.213**	**280.742**	**1.998.845**

Source: Federal Highway Administration, Monthly Gasoline Reports, 1983

Gasohol Consumption by States—1983

The table below, prepared by the Federal Highway Administration, shows gross gallons of gasohol reported by the distributors in each state. However, the agency says, the total must not be considered as a national total. In states where gasohol is taxed at the same rate as gasoline, the gallonage data are not reported separately and are commingled with gasoline data. In other states, however, partial tax exemptions have been legislated but the reporting systems have not yet been converted for separate reporting. In any case, this total should be considered a minimum not a national total. This also is a preliminary report.

(Add 000 gal.)

State	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Alabama	1,621	1,937	2,572	2,217	2,253	2,589	2,401	2,742	2,537	2,729	2,843	3,196	29,637
Alaska	—	—	—	—	—	—	—	—	—	—	—	—	—
Arizona	—	79	11	350	115	150	27	12	22	6	—	—	772
Arkansas	291	1,310	1,064	1,018	943	1,031	1,200	1,419	1,219	718	1,534	884	12,631
California	51,741	37,266	44,414	33,571	44,036	46,127	48,346	45,017	32,421	26,845	37,229	33,837	480,850
Colorado	4,389	3,400	4,105	3,931	3,363	3,400	3,500	2,700	4,500	8,900	8,500	6,000	56,688
Connecticut	407	433	410	226	—	—	—	—	—	—	—	—	1,476
Delaware	—	—	—	—	—	—	—	—	—	—	—	—	—
Dist. of Col.	1	1	4	10	—	—	—	—	—	2	—	—	18
Florida	13,790	16,977	24,560	24,755	26,738	32,063	35,630	35,027	33,587	36,605	36,097	41,394	357,232
Georgia	29	20	29	2	21	20	21	5	2	7	1	1	158
Hawaii	—	—	—	—	—	—	—	—	—	—	—	—	—
Idaho	419	506	680	905	884	693	764	764	714	—	—	—	6,329
Illinois	—	—	—	—	—	—	—	—	—	—	—	—	—
Indiana	—	—	—	—	—	—	—	—	—	—	—	—	—
Iowa	35,042	39,061	41,574	44,966	41,540	50,762	44,968	44,585	42,018	41,401	39,524	44,800	510,241
Kansas	562	565	679	615	514	873	5,687	7,889	7,865	10,455	13,730	—	49,434
Kentucky	4,989	5,132	3,747	6,924	7,665	8,190	8,837	10,011	9,817	10,301	6,740	18,293	100,646
Louisiana	—	—	—	—	—	—	—	—	—	—	—	—	—
Maine	—	—	—	—	—	—	—	—	—	—	—	—	—
Maryland	4	10	7	4	—	7	—	16	6	6	8	6	74
Massachusetts	19	19	9	9	—	—	—	—	—	—	—	—	56
Michigan	27,091	24,763	28,765	47,935	64,206	68,160	69,247	63,614	43,312	40,573	42,193	46,132	565,991
Minnesota	434	103	141	494	760	194	201	161	196	307	339	—	3,330
Mississippi	—	—	—	—	—	—	—	—	—	—	—	—	—
Missouri	—	—	—	—	—	—	—	—	—	—	—	—	—
Montana	925	1,219	1,080	1,013	1,115	1,238	1,492	952	629	642	—	—	10,305
Nebraska	11,338	11,063	13,362	12,522	14,199	16,010	14,779	17,867	18,531	17,430	17,307	18,937	183,345
Nevada	61	36	54	60	72	—	—	—	—	—	—	—	283
New Hampshire	—	—	—	—	—	—	—	—	—	—	—	—	—
New Jersey	—	—	—	—	—	—	—	—	—	—	—	—	—
New Mexico	13	31	601	587	673	1,945	2,035	3,610	3,696	3,714	2,792	—	19,697
New York	—	—	—	—	—	—	—	—	—	—	—	—	—
North Carolina	367	311	347	442	282	245	138	107	42	181	178	272	2,912
North Dakota	105	531	383	320	331	457	352	364	334	118	655	490	4,440
Ohio	40,549	36,094	50,231	49,544	48,765	66,774	26,838	32,564	40,776	39,656	—	—	431,791
Oklahoma	27,862	23,203	1,171	60	—	3,958	3,945	4,274	3,690	2,241	2,027	3,273	75,704
Oregon	—	—	—	708	227	61	96	81	66	—	47	28	1,314
Pennsylvania	—	—	—	—	—	—	—	—	—	—	—	—	—
Rhode Island	—	—	—	—	—	—	—	—	—	—	—	—	—
South Carolina	161	227	188	82	116	121	46	24	5	14	20	14	1,018
South Dakota	1,676	1,767	2,291	1,856	2,593	2,942	3,178	3,259	3,021	2,993	2,590	3,215	31,381
Tennessee	—	—	—	—	—	—	—	—	—	—	—	—	—
Texas	21,327	25,423	40,522	46,102	51,026	42,249	31,376	17,846	2,140	1,412	1,274	1,394	282,091
Utah	32	461	1,577	3,104	4,712	4,324	5,452	6,504	—	—	833	2,165	29,164
Vermont	—	—	—	—	—	—	—	—	—	—	—	—	—
Virginia	3,594	2,457	4,849	3,702	3,993	3,126	5,185	3,394	3,528	3,391	4,073	4,921	46,213
Washington	673	1,078	1,076	545	856	810	525	543	457	259	324	797	7,943
West Virginia	—	—	—	—	—	—	—	—	—	—	—	—	—
Wisconsin	58	187	74	109	39	61	198	117	33	26	94	—	1,006
Wyoming	8	12	11	13	13	16	25	26	22	19	13	—	180
Total	**249,583**	**235,682**	**270,583**	**288,701**	**322,050**	**358,596**	**316,498**	**305,496**	**255,186**	**250,951**	**220,965**	**230,049**	**3,304,350**

Source: Federal Highway Administration, Monthly Gasoline Reports, 1983

Diesel Sales for Highway Use

Diesel sales for motor vehicles flattened out in 1982, racking up only 338-million bbl., which was 0.6% below the preceding year's total of 340-million bbl. That translates into 14.2-billion gal. in 1982 versus 14.3-billion gal. the preceding year.

Off-highway sales of diesel fuel also was down again. These sales amounted to 37.1-million bbl. in 1982, compared with 38.9-million bbl. in 1981. Off-highway consumption is farm and construction equipment and conveniences.

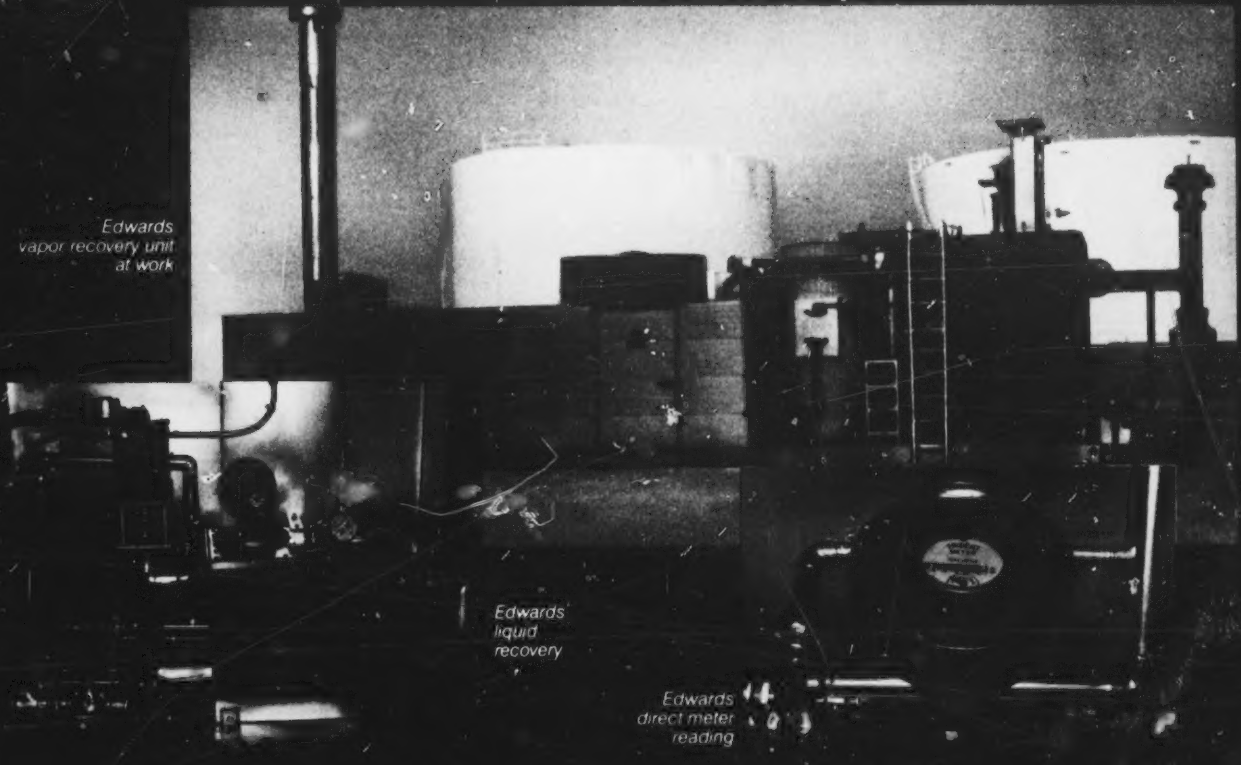
(Add 000 bbl.)

		On-Highway			Off-Highway		
Region	State	1982	1981	% Change	1982	1981	% Change
New England	Connecticut	2,698	2,662	1.4%	251	380	(33.9%)
	Maine	1,564	1,248	25.3	243	176	38.1
	Massachusetts	4,745	4,419	7.4	309	282	9.6
	New Hampshire	744	692	7.5	170	113	50.4
	Rhode Island	679	590	15.1	38	25	52.0
	Vermont	352	753	(53.3)	173	222	(22.1)
	Total	**10,782**	**9,664**	**11.6**	**1,184**	**1,198**	**(1.2)**
Mid-Atlantic	New Jersey	8,093	7,460	8.5	519	562	(7.7)
	New York	8,353	7,227	15.6	619	774	(20.0)
	Pennsylvania	15,296	15,311	—	2,136	2,476	(13.7)
	Total	**31,742**	**29,998**	**5.8**	**3,274**	**3,812**	**(14.1)**
South Atlantic	Delaware	921	862	6.4	134	78	76.9
	Dist. of Columbia	436	376	16.0	9	10	(1.0)
	Florida	13,098	12,968	1.0	310	630	(50.8)
	Georgia	11,801	12,067	(2.2)	191	171	11.7
	Maryland	4,023	4,730	(14.9)	326	571	(42.9)
	North Carolina	9,789	9,526	2.8	296	370	(20.0)
	South Carolina	5,682	4,968	14.4	197	193	2.0
	Virginia	8,286	9,038	(8.3)	572	574	—
	West Virginia	2,381	2,833	(15.6)	248	327	(24.2)
	Total	**56,427**	**57,368**	**(1.7)**	**2,283**	**2,924**	**(21.9)**
North East Central	Illinois	13,744	15,037	(8.6)	842	826	1.9
	Indiana	13,821	13,599	1.6	393	575	(31.7)
	Michigan	8,181	8,230	(0.6)	362	481	(24.7)
	Ohio	17,092	16,663	2.6	3,283	3,195	2.6
	Wisconsin	7,072	7,230	(2.2)	461	442	4.3
	Total	**59,910**	**60,759**	**(1.4)**	**5,341**	**5,519**	**(3.2)**
North West Central	Iowa	6,525	6,334	3.0	479	314	52.5
	Kansas	5,100	5,468	(6.7)	269	331	(18.7)
	Minnesota	6,341	5,987(a)	5.9	426	499	(14.2)
	Missouri	9,004	8,460	6.4	1,198	732	63.7
	Nebraska	4,086	3,438	18.8	224	199	12.6
	North Dakota	2,048	2,036	(0.6)	259	190	36.3
	South Dakota	1,900	1,714	10.9	102	97	5.2
	Total	**35,004**	**33,437**	**4.7**	**2,959**	**2,362**	**25.3**
East South Central	Alabama	6,758	6,782	—	703	919(a)	(23.5)
	Kentucky	5,747	5,911	(2.8)	844	947	(10.8)
	Mississippi	5,257	5,298(a)	(0.8)	693	991	(30.0)
	Tennessee	9,505	9,112	4.3	321	417	(23.0)
	Total	**27,267**	**27,103**	**0.6**	**2,561**	**3,274**	**(21.8)**
Southwest Central	Arkansas	5,512	5,458	(1.0)	877	733	19.6
	Louisiana	7,510	10,031	(25.1)	2,559	2,068	23.7
	Oklahoma	8,251	8,143	1.3	811	1,095	(25.9)
	Texas	32,692	31,564	3.6	7,184	5,465	31.5
	Total	**53,965**	**55,196**	**(2.2)**	**11,431**	**9,361**	**22.1**
Rockies	Arizona	4,581	5,323	(13.9)	276	379	(27.2)
	Colorado	4,211	3,458	21.8	595	655	(9.2)
	Idaho	1,718	1,331	29.0	233	639	(63.5)
	Montana	2,473	2,384	3.7	153	184	(16.8)
	Nevada	1,977	1,813	9.0	177	158	(12.0)
	New Mexico	3,512	5,848	(39.9)	489	1,733	(71.8)
	Utah	2,550	2,760	(7.6)	536	527	1.7
	Wyoming	2,253	2,271	(0.9)	578	883	(34.5)
	Total	**23,275**	**22,690**	**2.6**	**3,037**	**5,158**	**(41.1)**
Pacific Coast	Alaska	596	1,067	(44.1)	424	269	57.6
	California	27,679	28,423	(2.6)	3,026	2,960	2.2
	Hawaii	415	423	(1.9)	154	235	(34.5)
	Oregon	5,339	5,651	(5.5)	343	599	42.7
	Washington	5,579	5,456	2.3	1,101	1,180	(6.7)
	Total	**39,012**	**39,821**	**(2.0)**	**5,046**	**5,243**	**(3.7)**
	U.S. Total	338,006	340,002	(0.6)	37,118	38,851	(4.5)

(a) Revised

Source: Deliveries of Fuel Oil and Kerosine in 1982—Petroleum Supply Annual, Energy Information Administration, June 1983

GASOLINE VAPOR RECOVERY... PACKAGED UNITS by EDWARDS



Edwards vapor recovery unit at work

Edwards liquid recovery

Edwards direct meter reading

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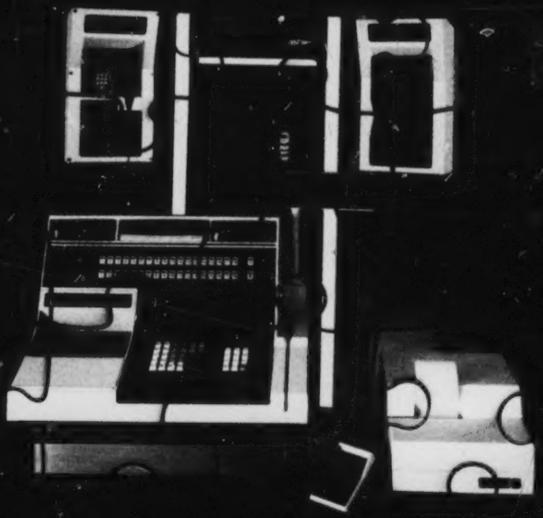
Late Report: 1983 Motor Fuel Consumption By States

	Taxable Gasoline (m gals.)		Distillate No. 2 (mm gals.)		On-Road Diesel (m gals.)		Gasohol (m gals.)	
State	1983	1982	1983	1982	1983	1982	1983	1982
Arkansas	193,764	203,215	260	282	14,606	13,604	0	0
Alabama	1,814,388	1,796,223	656	603	366,183	295,625	29,709	11,522
Arkansas	1,074,676	1,074,120	643	555	252,550	239,641	11,368	7,904
Arizona	1,441,969	1,329,339	388	349	207,444	180,627	771	5,095
California	11,001,262	10,671,521	2,334	2,429	1,298,095	1,272,322	480,850	464,004
Colorado	1,372,338	1,440,459	377	325	199,177	189,275	56,688	27,231
Connecticut	1,266,079	1,239,509	670	630	130,638	123,091	1,476	4,460
Dist. of Col.	157,235	159,266	42	31	21,370	19,538	18	34
Delaware	297,675	284,359	141	116	36,825	32,480	0	0
Florida	4,922,792	4,840,162	993	1,020	626,636	572,415	357,400	93,973
Georgia	3,250,691	3,118,669	655	678	606,167	538,023	156	147
Hawaii	306,973	307,439	204	212	21,429	18,104	0	368
Iowa	847,331	897,676	612	564	286,786	284,461	500,919	497,738
Idaho	446,858	441,501	169	174	92,068	87,503	8,747	4,101
Illinois	4,867,063	4,794,464	1,404	1,327	571,085	546,705	n.a.	n.a.
Indiana	2,375,352	2,389,541	1,306	1,254	692,812	602,342	n.a.	n.a.
Kansas	1,197,417	1,167,993	662	608	241,136	209,107	67,396	7,189
Kentucky	1,689,209	1,676,108	676	653	276,158	248,215	100,646	18,448
Louisiana	2,100,773	2,081,617	1,522	1,694	336,257	313,704	n.a.	n.a.
Massachusetts	2,233,680	2,204,091	976	1,029	210,789	184,936	56	286
Maryland	1,890,678	1,878,778	577	752	217,523	194,167	75	108
Maine	508,368	496,296	282	384	80,134	66,907	0	0
Michigan	3,431,827	3,536,576	987	870	402,255	354,477	566,635	206,794
Minnesota	1,952,740	1,954,191	735	684	312,169	282,383	4,240	4,653
Missouri	2,493,853	2,452,430	877	726	400,377	382,747	n.a.	n.a.
Mississippi	1,136,214	1,125,900	521	455	192,113	176,096	n.a.	n.a.
Montana	447,400	418,600	191	174	105,383	108,169	11,273	8,758
North Carolina	2,834,216	2,770,821	852	822	523,792	446,021	2,883	7,383
North Dakota	381,165	395,352	310	287	115,152	96,965	4,260	6,499
Nebraska	776,932	792,580	384	255	150,703	139,588	184,725	89,373
New Hampshire	394,755	383,123	52	186	34,517	31,988	0	268
New Jersey	3,238,769	3,170,520	2,228	2,456	408,270	373,771	0	0
New Mexico	694,769	722,107	355	350	153,286	178,050	26,589	188
Nevada	483,550	484,038	214	185	84,804	84,386	222	909
New York	5,250,934	5,362,896	1,336	2,425	409,643	400,780	n.a.	n.a.
Ohio	4,541,422	4,533,674	2,485	2,006	770,944	655,328	489,292	91,679
Oklahoma	1,630,998	1,609,405	463	660	370,660	362,073	75,706	155,042
Oregon	1,214,475	1,188,333	713	633	260,727	248,728	1,370	n.a.
Pennsylvania	4,285,710	4,253,941	2,050	2,156	702,547	656,139	n.a.	n.a.
Rhode Island	358,562	357,022	138	158	27,047	25,601	0	22
South Carolina	1,494,680	1,417,079	424	383	267,280	246,465	1,020	59,688
South Dakota	337,534	358,753	213	208	77,538	77,120	30,932	13,383
Tennessee	2,322,929	2,343,214	876	857	467,145	405,593	n.a.	n.a.
Texas	8,063,775	8,125,208	5,798	5,025	1,511,146	1,490,326	282,091	38,143
Utah	633,626	659,046	318	261	117,931	113,679	29,163	n.a.
Virginia	2,484,969	2,424,770	1,074	1,051	379,190	354,031	46,213	30,834
Vermont	240,393	235,634	71	126	16,629	15,745	0	n.a.
Washington	1,883,395	1,822,365	550	483	260,297	215,049	7,943	7,230
Wisconsin	1,981,669	1,952,337	736	777	330,944	301,754	1,046	2,717
West Virginia	968,225	1,001,206	222	228	116,484	100,777	0	0
Wyoming	338,442	355,926	392	391	118,176	108,556	202	258
Total U.S.	**101,554,499**	**100,699,393**	**41,116**	**40,945**	**15,873,015**	**14,665,177**	**4,289,080**	**2,159,429**

Notes: U.S. Gasohol total is estimated and includes "n.a." states, and all blended alcohol fuels qualifying for tax exemptions. "n.a." states where data are not available separately.

Evolution

Solution



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Suntronic Business Systems is a single-source supplier, providing all the necessary hardware and software for the Suntronic System as well as nationwide sales and service support.

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For more information call Bob Gold at (312) 631-6000, or write him at One Sun Parkway, Crystal Lake, Illinois 60014.

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Photo above Foreground: Station Minder System Controller with PIN Keypad, Customer Display and Journal Printer. Background: from Left to Right: Island Minder Card Reader, Cashier Cash Acceptor, Island Receipt Printer.

Average Gasoline Prices in 1983—

(¢ per gal.)

City		Retail Average Prices				Wholesale Average Prices*				Apparent Average Margins			
		Regular		Premium		Regular		Premium		Regular		Premium	
		Lead	Unld.	Lead	Unld.	Lead	Unld.	Lead	Unld.	Lead	Unld.	Lead	Unld.
Albuquerque, NM	F	132.92	137.73	—	144.15	90.42	94.28	—	100.47	24.71	25.66	—	25.89
	S	110.62	115.98	128.13	123.78	89.32	92.85	96.32	98.37	3.51	5.34	14.02	7.62
Anchorage, AK	F	140.18	146.24	169.90	152.92	87.88	91.97	94.40	96.82	36.48	38.45	—	40.28
	S	108.59	118.32	135.80	140.22	88.02	92.19	99.50	96.84	4.75	10.31	20.48	27.56
Atlanta, GA	F	135.38	143.53	—	151.65	88.47	92.07	—	97.68	26.68	30.92	—	33.12
	S	108.37	117.46	—	132.35	88.08	91.46	—	96.65	1.10	6.46	—	15.59
Bakersfield, CA	F	137.17	146.27	148.90	154.03	87.23	91.78	99.48	96.79	25.40	29.43	24.21	31.74
	S	111.84	122.44	132.76	137.83	86.56	90.84	95.23	96.72	2.17	7.89	13.24	16.53
Baltimore, MD	F	137.30	143.22	—	151.12	87.90	91.73	—	97.64	29.06	31.15	—	33.14
	S	109.35	115.75	—	132.76	87.83	91.64	—	97.57	1.18	3.77	—	14.85
Billings, MT	F	131.37	135.39	—	143.95	87.50	91.25	—	97.05	23.74	24.01	—	26.77
	S	114.26	118.17	—	127.33	87.23	90.85	—	96.61	6.90	7.19	—	10.59
Birmingham, AL	F	135.03	142.24	—	148.24	89.31	93.19	—	98.68	26.67	30.00	—	30.51
	S	112.11	120.73	131.34	133.70	88.66	92.26	95.75	97.72	4.40	9.42	16.54	16.93
Boise, ID	F	135.03	140.26	147.11	149.49	90.43	94.20	97.94	99.08	22.69	24.15	27.26	28.50
	S	116.39	121.94	128.64	135.98	89.50	93.06	97.87	99.08	4.98	6.97	8.86	14.99
Boston, MA	F	118.62	125.98	—	138.13	91.24	95.22	—	101.18	8.79	12.17	—	18.36
	S	111.29	118.28	—	132.89	90.36	94.27	—	100.00	2.34	5.42	—	14.30
Burlington, VT	F	130.18	135.00	—	146.83	95.79	99.79	—	106.12	15.51	16.33	—	21.83
	S	121.31	126.15	—	136.88	95.20	99.14	—	105.94	7.23	8.13	—	12.06
Charleston, SC	F	139.69	146.06	—	150.87	90.86	94.47	—	100.77	28.01	30.77	—	29.28
	S	112.81	120.48	—	132.36	88.54	92.00	—	97.32	3.45	7.66	—	14.22
Charlotte, NC	F	137.28	142.67	142.17	149.97	89.84	93.74	96.47	99.70	27.60	29.09	25.86	30.43
	S	110.80	118.40	—	130.68	88.55	92.10	—	97.55	2.41	6.46	—	13.29
Cheyenne, WY	F	125.90	130.66	—	146.36	91.23	95.01	—	98.31	18.71	19.69	—	32.09
	S	110.77	115.63	—	—	88.75	92.26	—	—	6.06	7.41	—	—
Chicago, IL	F	141.74	148.27	138.46	159.14	90.83	94.68	92.77	100.79	23.72	26.02	18.70	30.14
	S	116.67	123.41	140.70	141.29	90.03	93.73	92.09	99.90	.94	3.58	21.49	14.23
Cincinnati, OH	F	130.72	136.54	—	146.56	90.43	94.21	—	100.23	20.49	22.53	—	26.53
	S	111.13	117.58	—	130.12	89.62	93.24	—	99.33	1.71	4.54	—	10.99
Dallas, TX	F	136.19	141.53	—	147.86	88.46	92.42	—	98.21	34.93	36.31	—	36.85
	S	103.08	109.89	—	122.91	87.89	91.62	—	97.18	2.39	5.47	—	12.93
Denver, CO	F	136.37	142.81	145.80	152.50	89.36	92.82	96.94	99.00	28.62	31.60	30.47	35.11
	S	108.78	117.92	135.09	129.53	88.03	91.21	98.92	97.49	2.36	8.32	17.78	13.35
Des Moines, IA	F	138.29	144.64	—	138.44	92.80	96.47	—	64.67	24.60	27.28	—	52.88
	S	114.58	122.98	—	122.25	90.20	94.10	—	96.85	3.49	7.99	—	4.51
Detroit, MI	F	145.01	150.91	—	160.81	90.69	94.55	—	100.73	28.78	30.60	—	33.94
	S	115.28	122.01	—	138.34	89.89	93.60	—	99.52	1.00	3.76	—	13.54
El Paso, TX	F	123.05	128.15	—	136.28	89.33	93.24	—	98.33	20.92	22.11	—	25.15
	S	108.17	114.04	115.90	119.89	88.10	91.75	93.80	96.20	7.27	9.49	9.30	10.89
Fargo, ND	F	148.22	152.75	—	160.41	93.78	97.68	—	104.46	35.85	36.48	—	37.36
	S	122.24	126.44	—	132.13	92.34	95.83	—	102.49	11.31	12.02	—	11.05
Fresno, CA	F	138.74	145.55	147.24	154.43	88.21	92.36	99.55	98.00	25.90	28.17	22.58	30.91
	S	114.37	122.56	134.98	136.10	87.62	91.76	97.84	97.53	3.50	7.08	12.72	14.09
Honolulu, HI	F	148.61	152.98	158.16	163.20	92.41	96.18	100.33	102.07	27.73	28.17	29.00	32.10
	S	120.97	133.75	145.83	147.49	91.76	95.51	99.87	99.53	1.81	10.35	17.60	19.54
Houston, TX	F	132.86	138.09	127.11	145.02	88.03	92.01	93.35	97.71	32.03	33.28	20.96	34.51
	S	101.68	110.66	—	124.68	86.72	90.38	—	96.37	2.16	7.48	—	15.51
Indianapolis, IN	F	143.72	149.09	—	156.28	90.24	93.93	—	99.61	28.96	30.40	—	31.59
	S	114.48	120.58	133.96	137.20	89.80	93.38	92.31	99.25	1.47	3.72	17.57	13.72
Jackson, MS	F	138.32	144.30	151.64	151.54	88.75	92.58	95.73	98.27	26.09	27.96	31.60	29.16
	S	115.32	123.12	—	133.86	87.85	91.36	—	96.75	5.09	9.01	—	13.85
Jacksonville, FL	F	132.26	139.64	—	147.18	90.96	94.70	—	100.58	22.56	26.20	—	27.86
	S	109.91	117.89	—	129.97	89.94	93.48	—	98.91	1.23	5.67	—	12.32
Kansas City, MO	F	124.26	129.74	—	140.60	89.35	92.90	—	99.10	20.08	22.01	—	26.67
	S	107.00	113.36	—	122.96	88.18	91.53	—	96.56	3.99	7.00	—	11.57
Las Vegas, NV	F	139.54	146.36	152.20	153.05	87.99	92.54	100.48	97.72	29.46	31.73	29.63	33.24
	S	110.77	120.94	138.83	136.13	87.65	92.01	98.19	97.58	1.03	6.84	18.55	16.46
Little Rock, AR	F	134.24	140.39	—	145.40	87.91	91.62	—	98.32	28.98	31.42	—	29.73
	S	107.47	116.17	—	127.01	87.17	90.58	—	96.92	2.95	8.24	—	[illegible]
Long Island, NY	F	124.31	131.96	—	144.86	91.24	95.17	—	101.33	9.45	12.65	—	[illegible]
	S	117.74	125.09	—	138.76	91.02	94.92	—	100.87	3.54	6.49	—	[illegible]
Los Angeles, CA	F	134.14	141.43	144.99	150.18	85.64	90.15	97.90	95.43	23.71	26.06	21.65	29.00
	S	109.71	118.03	133.59	134.11	85.45	89.71	95.10	95.34	.93	4.49	13.73	13.98
Louisville, KY	F	132.25	137.49	—	144.57	90.13	93.82	—	99.29	24.30	25.85	—	27.46
	S	108.77	116.02	—	126.75	89.14	92.60	—	97.76	1.81	5.60	—	11.17

Retail, Wholesale and Apparent Margins

(¢ per gal.)

		Retail Average Prices				Wholesale Average Prices*				Apparent Average Margins			
		Regular		Premium		Regular		Premium		Regular		Premium	
City		Lead	Unld.	Lead	Unld.	Lead	Unld.	Lead	Unld.	Lead	Unld.	Lead	Unld.
Manchester, NH	F	128.95	135.04	—	144.78	90.81	94.80	—	100.26	16.23	18.33	—	22.61
	S	114.52	121.20	—	132.22	90.51	94.49	—	100.00	2.10	4.80	—	10.31
Memphis, TN	F	134.99	142.24	—	147.54	89.39	93.08	—	98.96	27.75	31.31	—	30.73
	S	106.86	117.21	—	131.13	88.39	91.85	—	97.43	.62	7.51	—	15.85
Miami, FL	F	134.69	142.63	—	150.27	89.91	93.76	—	99.73	26.50	30.59	—	32.26
	S	108.48	117.77	—	129.04	89.56	93.28	—	99.24	.64	6.21	—	11.52
Milwaukee, WI	F	136.09	142.60	—	150.91	90.63	94.76	—	100.52	23.71	26.09	—	28.64
	S	112.72	119.64	—	131.27	89.57	93.35	—	98.84	1.40	4.54	—	10.68
Minneapolis, MN	F	146.60	152.36	—	163.20	91.45	95.20	—	101.72	32.17	34.18	—	38.50
	S	115.03	121.21	144.41	130.20	89.93	93.36	98.55	98.31	2.12	4.87	22.88	8.91
New Haven, CT	F	126.76	134.12	—	144.82	92.51	96.45	—	102.15	14.10	17.52	—	22.52
	S	114.03	121.77	—	135.96	92.43	96.32	—	101.83	1.45	5.30	—	13.98
New Orleans, LA	F	138.90	144.80	—	152.02	88.98	92.97	—	99.00	34.08	35.99	—	37.18
	S	106.46	113.67	—	130.97	88.07	91.83	—	97.63	2.55	6.00	—	17.50
Newark, NJ	F	111.56	119.20	—	131.97	89.52	93.38	—	99.21	6.20	9.98	—	16.92
	S	107.63	115.15	—	127.65	89.70	93.41	—	98.59	2.09	5.91	—	13.22
Norfolk, VA	F	139.27	145.08	—	152.76	89.54	93.55	—	99.16	28.27	30.07	—	32.14
	S	113.31	119.58	—	134.46	88.89	92.59	—	98.18	2.96	5.53	—	14.82
Omaha, NE	F	137.93	145.61	—	153.09	90.83	94.83	—	100.00	24.59	28.27	—	30.58
	S	113.93	121.57	—	126.76	89.71	93.40	—	97.58	1.71	5.66	—	6.67
Philadelphia, PA	F	122.92	128.73	—	141.25	90.04	94.00	—	100.11	13.60	15.45	—	21.86
	S	109.01	114.46	—	132.46	90.26	94.26	—	100.21	.53	.92	—	12.97
Phoenix, AZ	F	131.22	137.29	—	144.08	82.67	86.65	—	92.37	29.84	31.93	—	33.00
	S	102.86	111.98	129.26	126.91	83.53	87.42	91.34	92.86	.62	5.85	19.21	15.34
Pittsburgh, PA	F	121.37	127.47	—	139.02	91.73	95.88	—	101.86	10.36	12.31	—	17.88
	S	110.91	117.16	—	131.47	92.02	96.14	—	101.98	.39	1.74	—	10.21
Portland, ME	F	122.25	128.53	—	140.26	90.97	94.79	—	100.71	10.45	12.91	—	18.72
	S	114.45	120.33	—	133.22	89.57	93.36	—	99.62	4.05	6.14	—	12.77
Portland, OR	F	127.30	134.66	143.18	145.56	85.17	89.35	97.12	94.89	23.26	26.44	27.19	31.80
	S	105.66	115.84	133.13	132.30	85.13	89.18	96.41	94.63	1.66	7.79	17.85	18.80
Providence, RI	F	126.99	133.14	—	144.49	90.60	94.58	—	100.40	16.02	18.19	—	23.72
	S	114.11	120.67	—	134.71	89.32	93.30	—	99.18	4.42	7.00	—	15.16
Reno, NV	F	141.43	149.54	158.01	158.85	89.96	94.70	102.56	99.80	27.62	30.99	31.60	35.20
	S	113.03	122.92	141.77	138.61	90.22	94.55	99.48	100.26	-1.04	4.52	18.44	14.50
Rochester, NY	F	126.86	132.72	—	144.36	92.14	96.07	—	102.09	11.18	12.73	—	17.59
	S	120.23	126.29	—	138.35	91.53	95.46	—	100.82	5.59	7.33	—	13.24
Sacramento, CA	F	139.76	146.36	148.18	154.21	87.66	91.77	99.23	97.39	27.41	29.53	23.78	31.31
	S	111.65	120.37	130.79	134.55	86.52	90.66	93.18	97.04	2.03	6.12	13.43	13.11
Salt Lake City, UT	F	128.25	133.09	139.08	144.68	88.73	92.31	98.03	97.36	20.68	21.94	22.21	28.48
	S	111.70	116.03	125.78	126.59	86.99	90.31	94.61	96.79	5.87	6.88	12.33	10.96
San Diego, CA	F	137.41	143.97	149.35	152.33	86.81	91.22	99.17	96.56	26.04	27.82	24.95	30.37
	S	111.72	119.39	134.00	136.01	86.30	90.49	94.66	96.51	2.32	5.36	14.98	15.02
San Francisco, CA	F	138.59	146.07	149.28	155.29	87.21	91.42	98.00	97.01	26.21	29.03	25.47	32.10
	S	112.23	122.17	135.77	137.70	86.82	90.95	94.52	96.92	1.84	7.05	16.26	15.67
Seattle, WA	F	135.51	140.88	147.10	149.89	84.78	89.16	96.91	94.54	28.85	29.84	28.31	33.47
	S	108.17	115.81	132.80	132.06	84.61	88.86	95.82	94.35	1.68	5.07	15.10	15.83
Sioux Falls, SD	F	141.00	146.73	—	153.97	92.27	96.12	—	102.75	27.80	29.68	—	30.29
	S	118.65	123.56	—	130.62	90.80	94.34	—	102.10	6.92	8.29	—	7.59
Spokane, WA	F	132.55	137.75	143.19	146.92	87.15	90.52	90.23	96.42	23.52	25.35	31.08	28.62
	S	112.57	118.73	122.73	127.47	86.76	90.19	92.08	95.92	3.93	6.66	8.77	9.67
St. Louis, MO	F	130.04	135.80	—	144.82	90.34	94.21	—	99.94	24.87	26.76	—	30.05
	S	105.58	112.48	—	126.85	89.47	93.15	—	98.65	1.28	4.50	—	13.37
Stockton, CA	F	136.66	144.62	148.00	152.22	86.89	91.06	97.16	97.09	25.25	28.59	25.68	29.73
	S	110.18	120.06	130.84	131.86	86.14	90.22	93.44	96.29	1.02	6.26	13.21	11.53
Tampa/St. Pete, FL	F	134.68	141.67	—	149.54	89.93	93.71	—	100.01	26.84	30.05	—	31.62
	S	108.12	117.27	—	131.25	89.06	92.60	—	98.41	1.15	6.76	—	14.93
Tucson, AZ	F	126.32	132.78	119.71	143.23	83.01	87.00	90.59	92.17	24.60	27.07	10.41	32.35
	S	103.98	113.02	124.60	126.92	84.03	87.80	90.59	92.57	1.24	6.51	15.30	15.64
Tulsa, OK	F	132.25	137.21	—	139.73	89.80	93.50	—	98.85	27.98	29.24	—	26.41
	S	105.63	111.36	—	116.26	87.96	91.30	—	95.87	3.20	5.59	—	5.92
Washington, DC	F	139.05	145.33	—	153.61	88.44	92.38	—	98.61	28.77	31.11	—	33.16
	S	111.83	118.54	—	133.87	88.23	92.08	—	98.14	1.76	4.62	—	13.89
Wilmington, DE	F	126.10	131.36	—	140.72	86.60	90.58	—	96.29	20.60	21.88	—	25.53
	S	107.06	113.41	—	126.58	86.53	90.50	—	96.23	1.63	4.01	--	11.45

Note: F = Full Service, S = Self Service and Mini-Service. There is no self-service in Oregon or New Jersey. Retail includes all taxes and combines cash and credit prices.

*Wholesale average prices combine (1) average dealer buying prices (dealer tankwagon, extax) and (2) average rack prices plus an 1.0 cent a gallon average haul. Although there is no full-service or self-service distinction at wholesale, average wholesale prices may be different because the brand mix of each set is different.

Gasoline Prices by Grades and Months (a)

(U.S. averages, retail, including taxes, in ¢ per gal.)

		Leaded Regular	Unleaded Regular	Leaded Premium	Average for All Types
1983	January	114.6	122.8	135.3	121.3
	February	109.9	118.7	131.8	117.0
	March	106.4	115.1	127.4	113.5
	April	113.1	121.5	132.1	119.8
	May	117.7	125.9	137.6	124.3
	June	119.7	127.7	142.9	126.1
	July	120.7	128.8	144.6	127.2
	August	120.3	128.5	143.7	126.9
	September	118.9	127.4	140.5	125.7
	October	117.2	125.5	137.2	123.9
	November	115.6	124.1	135.6	122.4
	December	114.6	123.1	138.1	121.5
	Average	**115.7**	**124.1**	**137.2**	**122.5**
1982	January	128.5	135.8	145.6	134.1
	February	126.0	133.4	143.8	131.8
	March	120.6	128.4	140.7	126.8
	April	114.8	122.5	136.8	121.0
	May	116.6	123.7	137.9	122.4
	June	124.2	130.9	140.8	129.6
	July	126.3	133.1	145.0	131.8
	August	125.4	132.3	145.8	131.0
	September	123.6	130.8	144.1	129.5
	October	121.9	129.5	141.3	128.0
	November	120.7	128.3	141.2	126.8
	December	118.1	126.0	137.1	124.4
	Average	**122.2**	**129.6**	**141.7**	**128.1**
1981	January	123.8	129.8	133.8	126.9
	February	132.1	138.2	141.0	135.3
	March	135.2	141.7	144.9	138.8
	April	134.4	141.2	145.1	138.1
	May	133.3	140.0	144.7	137.0
	June	132.4	139.1	144.6	136.2
	July	131.5	138.2	144.6	135.3
	August	131.0	137.6	144.4	134.8
	September	130.5	137.6	145.6	135.8
	October	129.9	137.1	145.7	135.3
	November	129.7	136.9	146.2	135.1
	December	129.3	136.5	146.0	134.8
	Average	**131.1**	**137.8**	**143.9**	**135.3**
Average	1980	119.1	124.5	128.1	122.1
	1979	85.7	90.3	92.2	88.2
	1978	62.6	67.0	69.4	65.2
	1977	62.2	65.6	67.4	NA
	1976	59.0	61.4	63.6	NA
	1975	56.7	NA	60.9	NA
	1974	53.2	NA	56.9	NA

(a) Department of Energy discontinued in 1980 its series breaking out full-service and self-service prices, see Factbook '81 for last reports of this type; also, beginning in September 1981, Bureau of Labor Statistics changed the weights used in the calculation of average motor gasoline prices. In the fourth column above, gasohol is now included and unleaded premium is weighted more heavily.

Source: Department of Energy, Monthly Energy Review, March 1984.

Wholesale Price Trends Through 1983

	Refinery products in eight refinery markets representing total U.S.						Crude	
					Average 4 products			
Year	Motor gasoline ¢ gal.	Kero-sine ¢ gal.	Light fuel ¢ gal.	Heavy fuel ¢ gal.	¢ gal.	$/bbl.	8 areas $/bbl.	Products vs. crude $/bbl.
1983 (a)	83.75	85.12	80.15	57.30	75.33	31.64	26.130	5.51
1982	92.90	97.18	91.95	57.80	82.44	34.62	28.520	6.10
1981	101.63	101.03	97.20	61.17	88.75	37.28	31.770	5.51
1980	87.40	80.26	78.21	44.43	72.77	30.56	21.190	9.38
1979	56.84	56.50	54.47	33.63	49.50	20.79	12.640	8.15
1978	39.22	37.23	35.66	23.00	33.72	14.16	9.000	5.16
1977	36.99	35.81	34.41	25.87	32.21	13.95	8.570	5.38
1976	33.82	31.67	30.38	21.66	29.55	12.41	8.141	4.26
1975	30.27	27.41	26.09	22.03	27.03	11.35	7.560	3.79
1973	14.72	14.08	12.61	8.45	12.49	5.25	3.885	1.365
1971	12.70	12.90	10.75	7.76	10.94	4.59	3.385	1.205
1970	12.33	12.43	10.45	6.14	10.20	4.28	3.177	1.103
1965	11.52	11.28	9.04	4.81	9.12	3.83	2.864	0.966

(a) Preliminary

Source: Independent Petroleum Assn. of America. Product figures reflect trends in prices but not the actual sales realizations for producers or refiners.

Supplier Gasoline Prices, by Type of Seller

	Major Refiners			Other Refiners and Gas Plant Operators			Average		
	Sales to End-Users			Sales to End-Users			Sales to End-Users		
Year Months	Through Company Outlets	Other End-Users	Sales for Resale	Through Company Outlets	Other End-Users	Sales for Resale	Through Company Outlets	Other End-Users	Sales for Resale
1978 Average	**49.4**	**46.2**	**43.8**	**48.2**	**45.8**	**42.1**	**48.9**	**46.1**	**43.4**
1979 Average	**72.8**	**68.0**	**64.3**	**71.0**	**67.5**	**61.8**	**72.1**	**67.9**	**63.7**
1980 Average	**105.6**	**98.7**	**95.1**	**103.0**	**97.8**	**91.3**	**104.6**	**98.5**	**94.1**
1981 Average	**117.0**	**109.4**	**107.5**	**114.2**	**108.4**	**103.2**	**115.9**	**109.2**	**106.4**
1982									
January	113.1	105.7	103.3	110.4	104.8	99.2	112.0	105.5	102.3
February	110.8	103.6	99.9	106.2	102.7	95.9	109.8	103.4	98.9
March	104.3	97.4	93.6	101.8	96.6	89.8	103.3	97.3	92.6
April	100.3	93.8	90.5	97.9	93.0	86.8	99.4	93.6	89.6
May	104.2	97.4	95.1	101.7	96.6	91.2	103.2	97.3	94.1
June	111.5	104.2	101.6	108.8	103.3	97.5	110.5	104.1	100.5
July	112.6	105.2	102.8	109.9	104.4	98.6	111.6	105.1	101.7
August	111.2	103.9	102.0	108.5	103.0	97.9	110.1	103.7	101.0
September	109.9	102.7	100.6	107.3	101.9	96.6	108.9	102.6	99.6
October	108.6	101.5	99.4	106.0	100.6	95.4	107.6	101.3	98.4
November	107.3	100.2	97.4	104.7	99.4	93.5	106.3	100.1	96.4
December	104.4	97.5	93.4	101.8	96.7	89.6	103.4	97.4	92.4
1982 Average	**106.2**	**101.1**	**98.3**	**105.6**	**100.2**	**94.3**	**107.2**	**100.9**	**97.3**
1983									
January	99.0	93.2	89.6	96.3	90.9	85.5	98.0	92.9	88.5
February	94.4	88.5	86.2	91.9	86.9	83.0	93.4	88.3	85.4
March	91.7	84.8	83.7	90.0	86.4	80.5	91.1	84.9	82.9
April	94.9	88.8	87.0	97.7	87.8	84.8	95.9	88.7	86.5
May	98.5	91.4	90.9	96.9	89.7	88.6	98.0	91.3	90.4
June	99.6	93.4	92.1	97.6	92.2	89.3	98.9	93.2	91.5
July	100.2	95.1	93.1	98.2	93.2	89.6	99.5	94.9	92.3
August	99.8	94.2	92.3	98.1	93.6	88.9	99.2	94.1	91.5
September	98.8	91.8	91.0	96.5	90.5	87.6	98.0	91.7	90.2
October	97.0	90.8	86.9	94.9	88.2	85.2	96.3	90.6	88.1
November	95.5	89.6	87.5	93.2	88.0	83.6	94.7	89.5	86.6
December	94.1	87.4	84.8	91.7	86.5	80.4	93.2	87.4	83.8
1983 Average	**97.0**	**90.6**	**89.0**	**95.2**	**89.7**	**85.6**	**96.4**	**90.5**	**88.2**

Supplier Prices of Residual Fuel Oil

	Residual Fuel Oil Sulfur Content Less Than or Equal to 1 %		Residual Fuel Oil Sulfur Content Greater Than 1 %		Average	
Year Month	Sales to End-Users	Sales for Resale	Sales to End-Users	Sales for Resale	Sales to End-Users	Sales for Resale
1978 Average	**31.4**	**29.3**	**27.5**	**24.5**	**29.8**	**26.3**
1979 Average	**46.8**	**45.0**	**38.9**	**36.8**	**43.6**	**39.9**
1980 Average	**67.5**	**60.8**	**52.3**	**47.9**	**60.7**	**52.8**
1981 Average	**82.9**	**74.8**	**67.3**	**62.2**	**75.6**	**66.3**
1982						
January	77.7	71.8	60.7	57.0	68.8	62.0
February	77.4	71.5	58.4	54.6	69.1	60.2
March	75.6	68.4	57.1	54.1	67.4	59.1
April	73.5	66.8	57.8	54.6	65.1	58.5
May	74.0	68.4	61.5	58.0	66.7	61.0
June	75.1	68.1	63.2	58.6	68.8	61.5
July	72.7	67.9	62.9	56.3	68.1	60.1
August	71.8	67.1	61.5	58.7	66.2	60.7
September	72.1	68.1	61.6	58.3	66.3	61.2
October	75.9	72.6	62.9	59.5	68.1	63.5
November	76.3	72.6	64.1	60.7	70.0	65.3
December	72.0	69.2	61.9	58.2	66.4	61.7
1982 Average	**74.7**	**69.5**	**61.1**	**57.2**	**67.6**	**61.2**
1983						
January	70.5	65.0	60.1	57.0	64.2	60.3
February	66.0	63.0	58.5	55.7	62.0	58.5
March	66.2	60.0	57.0	55.9	60.9	57.7
April	64.3	60.1	58.7	56.5	61.0	57.7
May	66.9	62.6	59.7	57.8	63.2	59.2
June	69.2	63.2	60.1	58.5	64.7	60.2
July	70.4	65.2	61.4	60.5	65.9	62.2
August	71.6	66.7	63.2	62.0	67.7	63.8
September	72.6	67.0	65.3	63.3	69.0	64.6
October	72.1	68.8	64.9	62.6	68.7	64.7
November	70.7	66.5	64.4	62.2	67.4	63.6
December	72.0	67.3	63.1	60.2	67.2	62.3
1983 Average	**69.5**	**64.3**	**61.1**	**59.1**	**65.1**	**60.9**

Source: (Both tables) Energy Information Administration, Petroleum Marketing Monthly, December 1983.

Supplier Product Prices For Resale

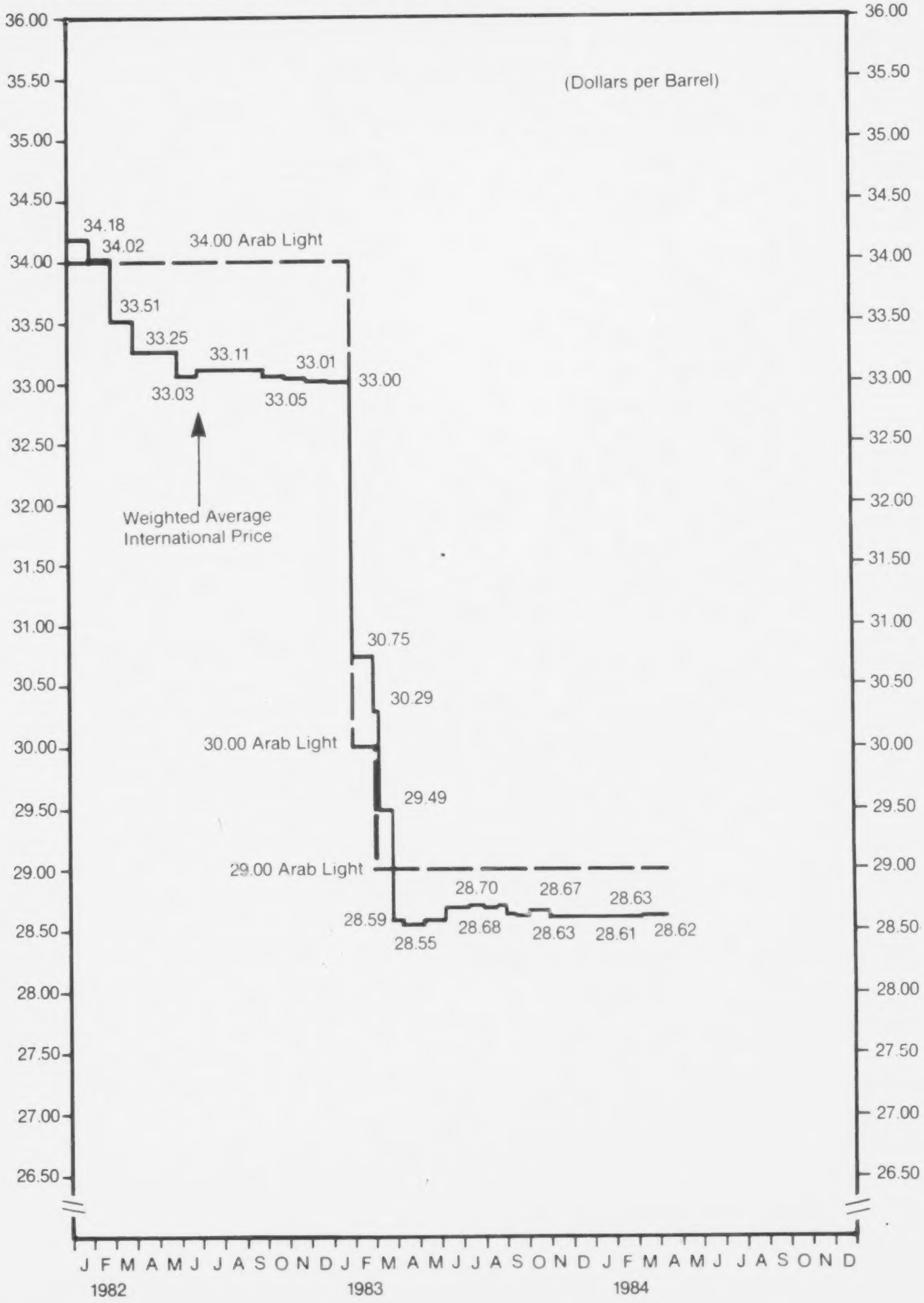
						No. 2 Distillate					
Year Month	Finished Motor Gasoline	Finished Aviation Gasoline	Kerosine-Type Jet Fuel	Kerosine	No. 1 Distillate	No. 2 Fuel Oil	No. 2 Diesel Fuel	Average	No. 4 Fuel[3]	Residual Fuel Oil	Propane (Consumer Grade)
1978 Average	**43.4**	**53.7**	**38.6**	**40.4**	**40.6**	**36.9**	**36.5**	**36.7**	**30.5**	**26.3**	**23.7**
1979 Average	**63.7**	**72.1**	**66.0**	**62.4**	**58.3**	**56.9**	**57.4**	**57.1**	**47.0**	**39.9**	**29.1**
1980 Average	**94.1**	**112.8**	**86.8**	**86.4**	**88.0**	**80.3**	**80.1**	**80.2**	**67.0**	**52.8**	**41.5**
1981 Average	**106.4**	**125.0**	**101.2**	**106.6**	**107.1**	**97.6**	**97.2**	**97.4**	**78.3**	**66.3**	**46.6**
1982											
January	102.3	128.8	100.5	108.5	107.0	98.0	96.7	97.5	74.7	62.0	42.4
February	98.9	128.4	99.2	106.3	105.7	93.9	93.5	93.7	74.9	60.2	37.8
March	92.6	123.1	96.8	99.9	99.9	86.6	89.0	87.3	71.6	59.1	35.3
April	89.6	119.3	92.2	95.1	98.7	83.3	85.4	84.1	71.3	58.5	34.4
May	94.1	115.3	91.0	95.5	100.1	86.5	87.9	87.2	72.8	61.0	34.9
June	100.5	120.7	93.3	97.4	104.8	89.8	92.2	91.0	74.6	61.5	36.4
July	101.7	126.7	93.5	97.0	104.4	91.0	92.1	91.6	73.2	60.1	39.2
August	101.0	123.9	94.2	96.9	102.9	90.3	91.0	90.7	72.9	60.7	43.2
September	99.6	121.8	94.7	100.6	102.6	92.0	91.1	91.6	72.5	61.2	48.8
October	98.4	122.7	97.6	105.7	106.1	96.5	94.4	95.5	76.4	63.5	50.4
November	96.4	124.6	97.3	105.3	106.5	97.3	96.1	96.8	76.2	65.3	52.5
December	92.4	125.9	92.9	98.2	99.2	89.5	90.0	89.6	73.7	61.7	48.9
1982 Average	**97.3**	**122.8**	**95.3**	**101.8**	**103.8**	**91.4**	**91.4**	**91.4**	**73.7**	**61.2**	**42.7**
1983											
January	88.5	124.8	91.8	94.2	94.0	85.7	85.5	85.7	81.7	60.3	47.0
February	85.4	123.7	89.9	90.0	89.0	80.1	80.7	80.3	76.8	58.5	46.7
March	82.9	121.2	84.5	83.1	84.5	76.0	75.2	75.7	72.5	57.7	47.4
April	86.5	120.0	82.9	84.2	86.0	78.9	76.8	78.0	74.1	57.7	50.0
May	90.4	120.2	84.3	87.7	88.5	80.9	80.2	80.5	72.1	59.2	50.5
June	91.5	115.0	84.1	84.6	86.8	80.9	80.3	80.6	72.9	60.2	50.9
July	92.3	115.2	84.8	85.2	86.9	81.7	80.8	81.2	70.0	62.2	50.7
August	91.5	114.7	85.4	86.7	90.1	83.4	81.7	82.5	70.2	63.8	49.8
September	90.2	113.7	86.3	91.9	92.0	85.1	83.5	84.2	69.8	64.6	50.1
October	88.1	118.9	86.4	90.8	92.1	83.5	83.0	83.2	67.9	64.7	49.9
November	86.6	118.7	84.4	90.4	90.2	82.6	82.0	82.4	70.2	63.6	47.3
December	83.8	118.8	83.6	88.6	88.4	80.7	80.1	80.5	71.4	62.3	45.4
1983 Average	**88.2**	**117.8**	**85.4**	**89.2**	**89.6**	**81.5**	**80.8**	**81.2**	**72.6**	**60.9**	**48.4**

Supplier Product Prices to End-Users

						No. 2 Distillate					
Year Month	Finished Motor Gasoline	Finished Aviation Gasoline	Kerosine-Type Jet Fuel	Kerosine	No. 1 Distillate	No. 2 Fuel Oil	No. 2 Diesel Fuel	Average	No. 4 Fuel[3]	Residual Fuel Oil	Propane (Consumer Grade)
1978 Average	**48.4**	**51.6**	**38.7**	**42.1**	**40.9**	**40.0**	**37.7**	**39.6**	**31.1**	**29.8**	**33.5**
1979 Average	**71.3**	**63.9**	**54.7**	**58.5**	**57.2**	**51.6**	**58.5**	**55.1**	**47.9**	**43.6**	**35.7**
1980 Average	**103.5**	**108.4**	**86.8**	**90.2**	**83.4**	**78.8**	**81.8**	**80.4**	**68.2**	**60.7**	**46.2**
1981 Average	**114.7**	**130.3**	**102.4**	**112.3**	**103.9**	**91.4**	**99.5**	**95.8**	**79.7**	**75.6**	**56.5**
1982											
January	110.8	132.0	101.0	111.2	107.2	94.4	98.7	98.0	76.0	68.8	57.8
February	108.6	132.8	100.4	110.7	108.4	95.0	96.7	97.0	76.3	69.1	57.7
March	102.2	133.6	99.0	112.2	105.3	90.6	91.9	91.9	72.9	67.4	57.3
April	98.3	131.5	96.2	103.1	104.9	85.0	90.1	87.6	72.6	65.1	57.3
May	102.1	131.5	94.9	105.1	97.1	84.4	91.5	87.8	74.1	66.7	57.8
June	109.3	131.3	94.7	109.4	102.8	85.1	95.8	90.8	75.9	68.8	57.7
July	110.4	133.2	94.7	109.0	92.5	83.6	94.8	89.6	74.5	68.1	55.1
August	108.9	131.4	94.8	101.9	101.3	86.3	93.1	89.3	74.2	66.2	56.7
September	107.7	128.8	94.5	102.7	104.1	86.2	93.5	89.9	73.8	66.3	59.9
October	106.4	130.3	95.2	107.7	104.2	89.8	95.7	92.8	77.7	68.1	60.7
November	105.1	129.5	95.8	113.7	105.4	94.2	97.7	95.9	77.6	70.0	63.2
December	102.2	129.1	95.0	108.3	98.5	93.9	94.0	94.9	75.0	66.4	64.2
1982 Average	**106.0**	**131.2**	**96.3**	**108.9**	**102.3**	**90.5**	**94.2**	**92.5**	**75.0**	**67.6**	**59.2**
1983											
January	97.1	129.2	94.5	104.5	100.8	100.9	89.2	91.9	81.0	64.2	72.7
February	92.5	127.2	92.6	101.4	95.4	97.0	84.0	86.6	77.3	62.0	71.7
March	89.8	126.6	90.6	97.1	91.2	93.0	78.0	80.1	76.6	60.9	68.1
April	94.7	125.2	88.8	93.4	92.0	89.1	78.8	80.2	77.9	61.0	68.6
May	96.6	125.4	87.8	93.8	94.4	89.5	81.8	82.5	75.7	63.2	72.2
June	97.8	125.6	86.3	90.0	97.9	87.3	81.5	82.0	74.7	64.7	67.3
July	98.8	125.1	85.6	89.0	99.9	85.1	82.0	82.3	75.2	65.9	66.4
August	98.4	125.9	85.5	90.8	99.0	86.1	83.0	83.3	75.8	67.7	68.9
September	96.9	124.2	86.1	92.7	99.5	88.0	84.8	85.2	75.3	69.0	74.9
October	95.4	124.7	86.0	98.9	98.0	89.0	84.2	84.7	73.0	68.7	69.6
November	93.9	124.5	85.8	100.0	95.4	90.1	83.5	84.5	77.4	67.4	72.8
December	92.3	124.4	85.5	96.6	92.6	92.1	82.2	84.0	75.8	67.2	76.1
1983 Average	**95.3**	**125.5**	**87.8**	**96.1**	**96.2**	**91.6**	**82.6**	**83.9**	**76.6**	**65.1**	**70.9**

Source: (Both tables) Energy Information Administration, Petroleum Marketing Monthly, December 1983 (3) March 1984

World Crude Oil Prices (a)



(a) Internationally traded oil only. Average price (FOB) weighted by estimated export volume.
Source: Weekly Petroleum Stores Report Energy Information Administration, April 1984

Spot Market Product Prices

($ per bbl.)

		Motor Gasoline		Gasoil/Heating Oil		Residual Fuel Oil	
1984		Rotterdam (98 Octane)	New York (89 Octane)	Rotterdam (0.5% Sulfur)	New York (0.2% Sulfur)	Rotterdam (1% Sulfur)	New York (1% Sulfur)
Jan	6	30.72	32.57	33.78	35.28	28.15	29.75
	13	30.25	32.34	33.85	36.12	27.78	30.15
	20	31.65	34.17	34.38	41.79	28.00	30.25
	27	32.24	33.34	35.12	44.10	27.85	31.25
Feb	3	31.48	34.69	34.79	42.42	28.23	31.50
	10	31.48	33.64	33.51	38.01	28.60	31.00
	17	31.48	33.85	33.04	34.23	28.53	30.75
	24	31.89	33.18	33.24	32.55	28.53	30.25
Mar	2	33.59	34.86	33.71	33.08	28.53	29.25
	9	33.47	35.01	33.98	32.86	28.30	29.25
	16	33.82	34.69	34.38	32.55	28.30	29.00
	23	33.29	34.38	34.12	33.50	28.15	28.75
	30	32.77	35.87	34.12	34.76	28.00	28.75
Apr	6	33.06	35.26	34.12	35.91	28.60	29.25
	13	33.06	35.15	33.31	36.02	28.15	29.40
	20	32.53	34.08	32.91	36.12	27.85	29.40
	27	32.36	33.73	32.84	36.18	27.85	29.40
1983							
Jan	7	34.88	35.13	37.73	34.86	27.55	25.75
	14	35.46	34.82	37.47	34.44	26.73	25.75
	21	34.29	36.29	37.00	35.60	26.58	26.00
	28	33.88	35.03	34.45	33.08	25.98	25.50
Feb	4	33.70	34.57	32.37	32.55	23.87	25.00
	11	31.48	34.82	33.98	32.76	24.47	26.00
	18	31.48	34.82	33.98	32.76	24.47	26.00
	25	30.72	33.24	30.63	31.08	22.97	25.00
Mar	4	31.01	32.99	31.70	30.56	23.50	25.25
	11	31.65	33.41	31.70	30.45	24.17	25.25
	18	32.30	34.57	31.64	30.56	24.92	25.25
	25	32.53	35.57	30.90	30.76	24.70	25.25
Apr	1	33.82	36.77	31.70	31.71	25.23	25.75
	8	34.70	36.77	32.51	32.66	25.30	26.00
	15	36.69	37.09	33.58	34.65	25.90	26.50
	22	35.58	37.40	33.78	35.28	25.60	26.75
	29	36.75	37.19	33.51	35.49	25.98	26.75
May	6	36.28	36.88	32.51	34.54	25.98	27.00
	13	34.94	36.67	31.57	33.18	25.30	26.50
	20	35.35	36.98	31.97	33.28	25.75	27.00
	27	35.58	37.19	32.24	33.50	26.13	27.25
Jun	3	35.76	37.19	32.10	33.28	25.98	27.50
	10	35.81	37.32	33.24	33.39	25.98	27.60
	17	36.87	37.84	33.38	34.12	25.83	28.05
	24	37.87	37.84	33.51	34.23	26.80	28.50
Jul	1	37.16	37.42	32.84	34.02	26.28	28.35
	8	Not available.					
	15	36.81	36.62	33.18	34.23	28.00	29.00
	22	36.28	36.63	33.18	34.23	28.23	28.75
	29	36.05	36.52	33.04	34.34	28.15	28.75
Aug	5	36.22	36.64	33.71	35.18	28.53	28.75
	12	36.40	36.52	34.18	35.28	28.68	29.00
	19	36.52	36.52	34.79	35.28	28.53	29.00
	26	36.34	36.73	34.65	35.28	28.38	29.35
Sep	2	35.87	36.29	34.18	35.07	28.08	29.25
	9	34.47	35.99	33.58	34.65	27.33	28.75
	16	34.35	35.78	33.44	34.86	26.95	28.75
	23	34.41	35.87	33.85	35.01	26.95	28.75
	30	33.24	34.92	33.71	34.02	27.63	28.75
Oct	7	33.41	34.29	32.51	33.50	27.40	28.00
	14	33.59	34.82	33.11	34.02	27.48	27.95
	21	34.17	34.40	34.05	33.28	27.78	27.90
	28	34.41	33.94	33.98	33.18	27.78	28.10
Nov	4	34.70	34.65	34.25	34.65	28.08	28.25
	11	35.05	34.25	34.65	34.12	27.85	28.75
	18	33.94	33.54	32.91	33.28	27.33	28.50
	25	33.59	33.08	32.84	33.18	26.43	28.25
Dec	2	33.06	32.66	33.58	32.97	26.65	28.20
	9	32.94	31.90	33.11	33.08	27.10	28.25
	16	31.95	30.91	33.11	32.66	27.55	28.50
	23	31.65	30.98	33.11	33.70	27.55	28.50
	30	Not available.					

International Prices for Gasoline and Fuel Oil

(U.S. dollars per gal. for gasoline; per 42-gal. bbl. for fuel oil)

	1/1/83				7/1/82				1/1/82			
	Gasoline		Fuel Oil		Gasoline		Fuel Oil		Gasoline		Fuel Oil	
Country	Reg.	Prem.	Dist.	Resid.	Reg.	Prem.	Dist.	Resid.	Reg.	Prem.	Dist.	Resid.
WESTERN HEMISPHERE												
Argentina	.90	1.00	17.05	10.87	1.09	1.30	16.79	10.11	—	—	—	—
Bolivia	.47	.66	17.49	—	.69	.86	27.10	—	.91	1.06	34.98	—
Brazil	2.47	—	36.39	26.84	2.83	—	39.97	27.37	—	—	—	—
Canada	1.34	1.46	—	33.61	1.29	1.40	—	31.30	—	—	—	—
Chile	—	2.47	36.39	26.84	—	2.83	39.97	27.37	—	—	—	—
Colombia	.95	1.08	—	—	.86	1.00	—	—	.94	1.10	19.74	—
Ecuador	.91	1.21	—	8.91	.45	.61	—	8.91	—	—	—	—
El Salvador	—	—	—	—	2.49	2.56	32.76	—	2.90	2.98	38.13	—
Jamaica	2.12	2.17	55.15	34.03	2.12	2.17	55.15	34.03	2.12	2.17	55.15	34.03
Mexico	.51	.76	10.71	36.40	.48	.80	8.42	36.68	.87	1.45	15.23	3.19
Panama Republic	2.18	2.32	—	—	2.18	2.32	—	—	2.18	2.32	38.90	—
Paraguay	4.81	6.01	68.77	55.52	3.30	4.21	68.77	55.52	3.30	4.21	68.77	55.52
Peru	1.01	1.21	33.02	29.43	1.01	1.23	32.74	27.23	.94	1.13	—	—
United States	1.15	1.35	42.42	27.05	1.26	1.45	43.22	25.97	1.22	1.35	45.15	27.26
Venezuela	.26	.88	2.40	1.78	.26	.88	2.40	1.78	.13	.31	2.03	1.50
WESTERN EUROPE												
Austria	2.40	2.49	—	29.46	2.31	2.40	—	30.67	2.64	2.78	—	34.84
Belgium	2.53	2.64	54.77	36.71	2.64	2.72	50.95	35.08	2.77	2.79	59.62	31.07
Denmark	2.83	2.86	70.29	45.03	2.70	2.74	60.92	41.58	2.86	2.90	71.06	47.20
Finland	—	—	—	—	2.63	2.75	78.48	27.52	2.68	2.79	79.84	28.57
France	2.51	2.68	60.73	30.57	2.24	2.41	51.20	28.14	—	—	—	—
Germany, West	2.14	2.27	46.84	30.17	2.04	2.15	—	29.97	—	—	—	—
Greece	2.47	2.68	—	30.37	2.19	2.41	45.59	26.67	—	—	—	—
Italy	3.16	3.30	64.21	37.22	2.65	2.79	49.62	28.00	—	—	—	—
Luxembourg	1.85	1.92	45.73	27.51	2.00	2.06	48.77	29.38	2.26	2.34	55.04	28.82
Netherlands	2.36	2.44	—	36.05	2.47	2.55	—	37.86	2.59	2.50	—	—
Norway	2.67	2.73	60.94	38.90	2.67	2.72	59.77	34.20	2.84	2.89	—	39.62
Portugal	2.98	3.15	62.48	28.07	2.64	2.82	60.59	28.40	3.14	3.37	68.40	29.63
Spain	2.38	2.69	65.93	30.76	2.22	2.49	61.70	28.27	2.56	2.88	71.21	32.63
Sweden	2.18	2.24	50.19	44.31	2.35	2.40	55.24	46.53	—	—	—	—
Switzerland	2.29	2.37	43.25	28.43	—	—	—	—	—	—	—	—
Turkey	—	—	—	—	1.38	2.09	53.46	36.57	1.47	1.62	41.07	27.27
United Kingdom	NR	NR	NR	NR	NR	NR	NR	NR	2.46	2.50	—	44.95
Yugoslavia	2.32	2.44	48.70	44.85	2.94	2.78	—	—	2.66	2.86	59.10	54.04
MIDDLE EAST												
Israel	2.18	2.37	67.89	30.78	2.06	2.25	64.59	32.46	1.84	2.08	58.88	33.93
Saudi Arabia	.18	.24	1.62	2.02	.18	.24	1.62	2.02	—	—	—	—
AFRICA												
Ethiopia	2.18	2.36	45.58	26.43	—	—	—	—	2.18	2.36	46.58	—
Ghana	3.42	3.73	58.03	43.39	3.42	3.73	58.03	43.39	3.42	3.72	58.02	43.39
Morocco	2.72	2.84	38.50	32.37	2.76	2.78	39.07	32.84	—	—	—	—
South Africa, Republic of	2.14	2.17	68.67	37.86	1.96	1.98	63.29	32.13	2.27	2.30	72.56	35.77
Tunisia	1.82	1.94	—	18.29	1.67	1.86	—	15.41	1.95	2.06	—	15.24
ASIA-PACIFIC												
Australia	1.81	1.85	60.69	38.43	1.68	1.72	49.05	35.72	—	—	—	—
India	—	—	—	—	2.55	2.62	46.39	36.90	2.53	2.60	41.82	35.09
Indonesia	1.76	2.19	28.98	28.98	1.40	2.10	18.35	18.35	—	—	—	—
Japan	2.70	2.85	70.88	41.07	2.46	2.61	64.84	37.41	2.74	2.91	74.20	42.04
Korea (South)	3.32	4.47	—	43.56	—	—	—	—	4.06	5.82	—	48.73
Pakistan	1.61	1.76	—	15.02	1.69	1.85	—	15.81	1.93	2.19	—	19.46
Philippines	2.03	2.14	—	—	2.25	2.34	—	—	2.36	2.45	40.83	40.83
Singapore	1.83	2.03	49.68	26.18	1.73	1.88	47.70	27.06	—	—	—	—
Sri Lanka	—	1.79	49.49	28.39	—	1.90	52.46	24.78	—	—	—	—
Thailand	1.88	2.21	49.22	30.35	1.88	2.21	49.22	30.35	1.87	2.21	49.11	30.28

(NR) = not reported; (—) = not listed in 1983 summaries.

Source: 1982 International Energy Annual, Department of Energy, September 1983. Gasoline and fuel oil prices are for the capitals of each country involved, except the U.S., which is the national average for the month. All gasoline prices are pump retails and include taxes and custom duties.

International Prices of Diesel Fuel and Household Kerosine

(U.S. cents per gal.)

Country	Auto Diesel 1/1/83	Auto Diesel 7/1/82	Household Kerosine 1/1/83	Household Kerosine 7/1/82
Western Hemisphere				
Argentina	.41	.40	.55	.64
Bolivia	.44	.69	.15	.43
Brazil	1.51	1.70	1.52	1.72
Canada	1.35	1.30	1.28	1.16
Chile	1.48	1.41	1.54	1.56
Colombia	.95	.86	.95	.86
Ecuador	.33	.35	.18	.18
El Salvador	—	1.70	—	1.58
Jamaica	1.35	1.35	1.16	1.16
Mexico	.25	.20	.17	.04
Panama Republic	1.40	1.40	1.30	1.30
Paraguay	1.74	1.74	2.10	2.10
Peru	.79	.78	.35	.26
United States	.89	1.01	1.04	1.09
Venezuela	.27	—	.09	.09
Western Europe				
Austria	2.33	2.24	3.76	3.72
Belgium	1.98	1.85	1.35	1.26
Denmark	1.82	1.60	1.68	1.47
Finland	—	1.90	—	1.44
France	2.07	1.83	—	—
Germany, West	2.12	2.00	—	—
Greece	1.31	1.09	—	1.41
Italy	1.64	1.35	1.79	1.13
Luxembourg	1.39	1.44	1.16	—
Netherlands	1.73	1.65	1.42	1.32
Norway	1.55	1.53	1.57	1.47
Portugal	1.49	1.44	1.49	1.40
Spain	1.57	1.47	1.63	1.50
Sweden	1.35	1.42	1.36	1.25
Switzerland	2.42	—	—	—
Turkey	—	1.27	—	1.31
United Kingdom	N.R.	N.R.	N.R.	N.R.
Yugoslavia	2.00	2.41	1.86	—
Middle East				
Israel	1.72	1.64	1.76	1.76
Saudi Arabia	.08	.08	.15	.15
Africa				
Ethiopia	1.44	—	1.20	—
Ghana	2.57	2.57	1.51	1.51
Morocco	1.36	1.38	1.36	1.38
South Africa, Rep. of	2.20	2.00	1.43	1.29
Tunisia	—	—	.61	.44
Asia-Pacific				
Australia	1.88	1.77	1.48	1.35
Burma				
India	—	1.27	—	.76
Indonesia	.80	.50	.55	.35
Japan	1.92	1.74	1.53	1.35
Korea (South)	1.42	—	1.49	—
Pakistan	1.02	1.07	.81	.85
Philippines	1.28	1.39	1.28	1.39
Singapore	1.23	1.23	1.38	1.48
Sri Lanka	1.06	1.12	.69	.74
Thailand	1.22	1.22	1.01	1.01

Source: 1982 International Energy Report, Department of Energy, September 1983.

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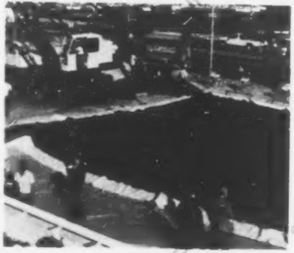

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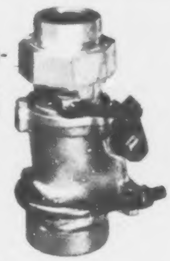

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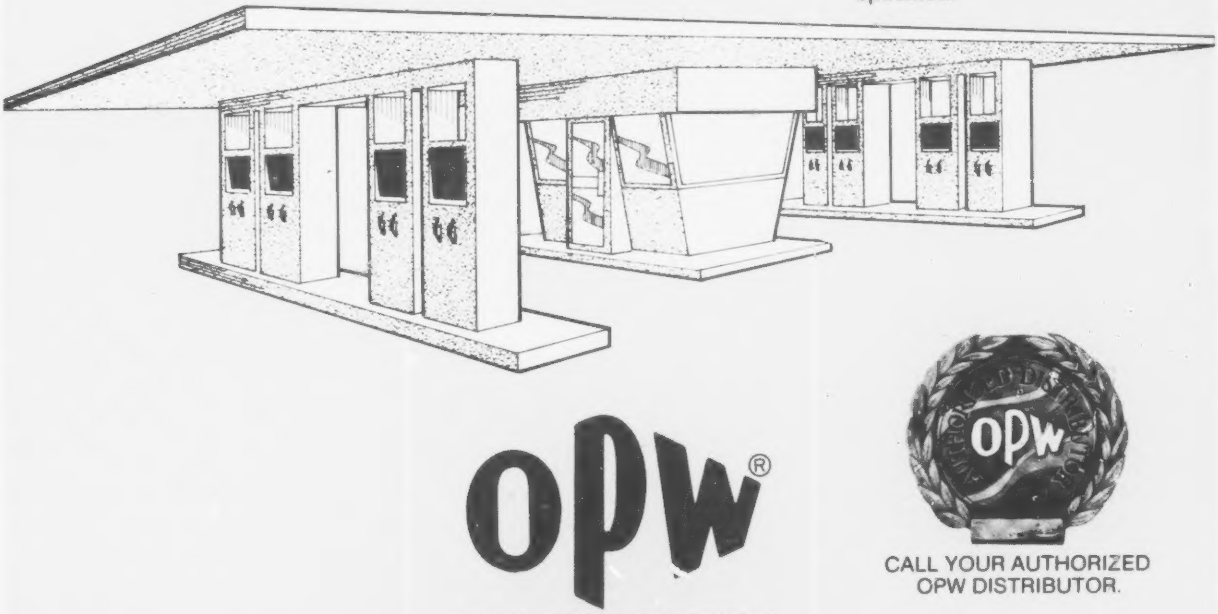

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Service Station Shakeout Continues

The service station shakeout that began back in 1973 in the wake of the Arab oil embargo continued unabated in 1983. And, the outlook is for more of the same in 1984.

The new population total for the end of 1983 is 136,570. This is 2,680 units less than had been projected last January when the annual government forecast stated it would be 139,250 stations on Dec. 31.

Not only that, there's no end in sight for the crunch. The government forecast for 1984 is that the total will shrink anew to 130,000 stations by Dec. 31. That would be roughly equal to the population in the early 1930s.

The current situation is tinged with irony for *NPN*, which observed its 75th anniversary in February. During most of the magazine's history, the service station story was one of near-continual building, with competing outlets and brands on all four corners of many intersections.

There was almost a building frenzy during the 1950s and 1960s when the net additions were counted in the thousands. Today, it's the other way around, with the population going down at a faster rate than it grew.

All is not gloom in this negative report, however.

For example, there is no shortage of service stations, even though the number of automobiles, trucks and buses on the road is at an all-time high—more than 165-million vehicles now, and increasing annually.

The stations that are disappearing are generally on the smaller side—30,000 to 40,000 gal. month. In their places are being built the big super-stations—the 100,000- to 200,000-gal./month-plus pumpers that are more economical to operate and frequently are on a seven-day, 24-hour basis. Most are self-service stations, which seem to have greater appeal to motorists everywhere.

The industry is spending billions of dollars on new marketing facilities and programs as the majors and the minors reposition themselves and intensify their competition for gasoline gallonage.

McGraw-Hill's annual survey, issued in mid-November, said the oil companies had projected marketing expansion and development expenditures of $2.1-billion in 1983, $2.6-billion in 1984 and $2.8-billion in 1985—a three-year total of $7.5-billion.

These are among the highest investments ever targeted for marketing facilities, and they come in an era of gasoline surpluses, depressed prices and margins, cost-cutting, alcohol additives, and regrouping by all in the marketplaces.

The government report states that dollar sales at service stations slipped slightly in 1983—down a little less than 1% below 1982's total of $104.6-billion for gasoline and oil products and services only.

The 1983 total was put at $104.6-billion. It was far, far below the rosy projection of $114.5 billion that was made last January, however. The economic recession and the sharp drop-off in pump prices were to blame for this.

The 1984 outlook is mildly optimistic. Dollar volume at service stations is expected to exceed $106.2-billion by the end of this year. That would be an increase of 2.5% over 1983, which would parallel other economic forecasts of minor to moderate growth in 1984.

The service station data is compiled by the Bureau of Industrial Economics of the U.S. Department of Commerce as part of its annual report on franchising activities in the U.S. Copies of "Franchising in the U.S. Economy, 1982-1984," are available from the Superintendent of Documents in Washington, D.C.

The Bureau of Industrial Economics is somewhat of a sister organization to the U.S. Bureau of the Census, which also is a section of the Commerce Department. The Census Bureau took its quinquennial survey of retail businesses in 1982, but is still struggling to get the data ready for publication. None of it had been published by May 1 of this year.

The BIE service station totals are in keeping with the standards used by the Census Bureau, i.e., to be classified as a service station the facility must get 50% or more of its income from the sale of gasoline and oil products.

Arbitrarily excluded from these totals, therefore, are the thousands of pumps and stations at convenience stores, mass merchandisers, fleets and other places. The C-store world alone has a population close to 50,000, and it is estimated that almost half of these currently sell gasoline.

Last fall, the *Lundberg Letter* estimated the service station universe at 210,875 units.

The Bureau of Industrial Economics data showed that its service station population declined 5.6% in 1983 and is expected to drop another 4.8% in 1984.

If these percentages are applied to the Lundberg universe, then it logically could mean that the total population at the end of 1983 was down 11,809 stations to 199,066, and will be down 9,555 stations more to 189,511 stations at the end of 1984.

The Rise and Fall of U.S. Service Stations

	No. of Stations(a)			Sales ($000,000)		
Year	Total	Company-owned	Franchisee-owned	Total	Company-owned	Franchisee-owned
1984	130,000	23,400	106,600	$106,175	$23,400	$106,600
1983	136,570	24,583	111,987	103,587	18,646	84,981
1982	144,690	26,044	118,646	106,544	19,178	87,366
1981	151,250	27,225	124,025	105,145	18,926	89,219
1980	158,540	30,122	128,418	96,338	18,304	78,034
1979	164,780	31,310	133,480	71,894	13,660	58,234
1978	172,300	32,737	139,563	60,884	12,177	48,707
1977	176,465	33,375	141,160	58,231	11,646	46,585
1976	186,840	37,368	149,472	53,416	10,683	42,733
1975	189,480	37,896	151,584	47,387	9,477	37,910
1974	196,130	39,226	156,904	43,829	8,766	35,063
1973	215,880	47,176	172,704	37,666	7,533	30,183
1972	226,459	44,200	176,259	33,656	6,812	26,844
1971	220,000	44,000	176,000	31,149	6,230	24,919
1970	222,000	44,400	177,600	29,340	5,868	23,472

(a) As defined by U.S. Census Bureau, stations with 50% or more of their income from sales petroleum products.

Service Station Population Slips Anew

				Percent Changes	
	1984	1983	1982	1983-84	1982-83
Number of establishments	130,000	136,570	144,690	−4.8%	−5.6%
Company-owned	23,400	24,583	26,044		
Franchisee-owned	106,600	111,987	118,646		
Total sales of products and services (000,000)	$106,175	$103,587	$104,633	+2.5	−1.0
Company-owned	19,112	18,646	18,834		
Franchisee-owned	87,063	84,941	85,799		

(a) As of Dec. 31 of each year; (b) Service stations as defined by U.S. Census Bureau, i.e., stations with 50% or more of their income being derived from the sale of petroleum products.

Source: "Franchising in the Economy, 1982-84," "Bureau of Industrial Economics, U.S. Department of Commerce, January 1984.

Service Station Population by States—1984 vs. 1977

The U.S. Census Bureau surveyed all retail businesses in 1982 but experienced unusual delays in reporting the results. At *Factbook* presstime, the Bureau said it still hoped to publish its service station data sometime in June or July. The data will be published in *NPN* magazine as soon as it becomes available.

The table below is based on the old 1977 census figures. On a national population basis, it is assumed the overall percentage dipped 5.6% in 1983 and is expected to drop another 4.8% by the end of 1984. But with fewer stations and an improving economy, dollar sales at stations are going up again.

	Total Gasoline Service Stations				Total Dollar Sales (add 000)			
	1984(a)	1983(a)	1982(a)	1977(b)	1984(a)	1983(a)	1982(a)	1977(b)
Alabama	2,624	2,756	2,920	3,562	$1,614,310	$1,574,937	$1,590,845	$81[illegible],443
Alaska	153	161	171	211	204,852	199,856	201,875	102,845
Arizona	1,220	1,281	1,357	1,656	1,297,961	1,266,303	1,279,094	651,625
Arkansas	1,774	1,863	1,973	2,407	990,143	965,993	975,750	495,560
California	10,595	11,130	11,790	14,388	11,418,888	11,140,379	11,252,908	5,732,696
Colorado	1,829	1,922	2,036	2,485	1,410,333	1,375,935	1,389,833	708,010
Connecticut	1,631	1,713	1,815	2,215	1,621,531	1,581,981	1,597,961	814,068
Delaware	321	337	357	435	321,709	313,862	317,033	161,511
District of Columbia	185	194	205	250	274,632	267,934	270,640	138,354
Florida	5,367	5,638	5,972	7,287	4,753,568	4,637,627	4,684,472	2,386,463
Georgia	3,731	3,919	4,151	5,066	2,047,676	1,997,733	2,017,912	1,350,915
Hawaii	306	321	340	415	350,728	342,174	345,630	176,079
Idaho	611	642	680	830	444,099	433,267	437,643	222,954
Illinois	5,754	6,044	6,403	7,815	6,058,518	5,910,749	5,970,454	3,040,967
Indiana	3,568	3,748	3,970	4,867	3,389,957	3,307,275	3,340,682	1,701,885
Iowa	2,522	2,649	2,806	3,424	1,900,404	1,854,053	1,872,781	954,073
Kansas	1,815	1,907	2,021	2,466	1,3[illegible]7,464	1,285,331	1,298,314	661,416
Kentucky	2,543	2,671	2,829	3,452	2,033,063	1,983,476	2,003,511	1,020,672
Louisiana	2,202	2,313	2,450	2,989	1,709,555	1,667,859	1,684,706	858,259
Maine	687	722	765	933	486,036	474,181	478,971	244,009
Maryland	1,815	1,907	2,020	2,465	2,410,058	2,351,276	2,375,026	1,209,948
Massachusetts	2,859	3,003	3,181	3,882	2,568,965	2,506,308	2,531,624	1,289,715
Michigan	4,840	5,084	5,386	6,572	5,160,703	5,034,832	5,085,689	2,590,860
Minnesota	2,415	2,537	2,688	3,280	2,357,981	2,300,469	2,323,706	1,193,895
Mississippi	1,445	1,518	1,608	1,962	904,592	882,529	891,443	454,139
Missouri	3,690	3,876	4,106	5,008	2,981,391	2,908,674	2,938,055	1,496,768
Montana	712	748	792	968	542,123	528,900	534,242	273,166
Nebraska	1,276	1,340	1,419	1,732	1,049,829	1,024,223	1,034,569	529,836
Nevada	472	496	525	641	586,773	572,461	578,243	294,582
New Hampshire	519	545	577	704	472,579	461,053	465,710	237,251
New Jersey	3,940	4,139	4,384	5,350	3,592,606	3,504,981	3,540,385	1,803,619
New Mexico	1,023	1,075	1,139	1,389	729,670	711,873	719,094	366,336
New York	6,810	7,153	7,577	9,245	5,764,326	5,623,733	5,680,538	2,893,091
North Carolina	4,254	4,468	4,733	5,775	2,709,187	2,643,109	2,669,807	1,360,111
North Dakota	506	532	564	687	401,372	391,582	395,537	201,503
Ohio	6,495	6,822	7,227	8,820	6,208,296	6,056,874	6,118,055	3,116,790
Oklahoma	2,255	2,369	2,509	3,063	1,305,291	1,273,455	1,286,318	655,239
Oregon	1,611	1,692	1,792	2,185	1,304,264	1,272,453	1,285,306	654,788
Pennsylvania	6,624	6,958	7,371	8,994	5,690,780	5,511,980	5,608,061	2,856,978
Rhode Island	512	538	570	697	431,175	420,659	424,908	216,467
South Carolina	2,210	2,321	2,459	3,001	1,438,473	1,402,511	1,416,678	721,715
South Dakota	633	665	704	861	479,573	467,876	472,602	240,764
Tennessee	3,011	3,163	3,351	4,090	2,292,174	2,236,267	2,258,856	1,150,756
Texas	9,389	9,862	10,447	12,747	6,860,724	6,693,389	6,760,999	3,444,333
Utah	846	889	942	1,149	731,270	713,434	720,640	367,125
Vermont	397	417	442	540	277,966	271,186	273,925	139,550
Virginia	2,940	3,088	3,271	3,992	2,950,256	2,878,299	2,907,373	1,481,137
Washington	2,212	2,323	2,461	3,005	1,886,309	1,840,301	1,858,890	946,996
West Virginia	1,339	1,407	1,490	1,818	982,756	958,786	968,471	493,332
Wisconsin	2,977	3,127	3,313	4,043	2,490,263	2,429,525	2,454,066	1,250,204
Wyoming	475	499	529	647	427,172	416,753	420,963	214,456
Total	**129,940**	**136,492**	**144,588**	**176,465**	**$111,634,324**	**$108,910,656**	**$110,010,794**	**$56,468,144**

(a) Projections by NPN based on census data and other Commerce Department reports

(b) U.S. Census Bureau Retail Trades Census, 1977

Source: NPN projections based on Commerce Department data

Retail Marketing: A Study in Diversity

Modern oil marketing is almost chaotic these days compared to the way it used to be, according to an early 1984 Lundberg Survey report which covered 16,810 service stations in all 50 states.

Here are some of the highlights—remembering, of course, that in the early 1970s, virtually all majors were full-service at the pumps, most had service bays and diesel fuel was strictly a truck-stop product:

- Of the stations surveyed, only 13.1% now are full service, while 40.9% are self-service and 46.0% are split-island. But that's only half the story. The breakdown [See chart.] shows that of the majors surveyed, 14.8% were full-service, 25.0% self-service, and 60.2% split-island. The non-majors were 8.7% full-service, 81.4% self-service and 9.9% split-island.

The diversity within the ranks is literally amazing. Citgo and Arco, at 77.0% and 71.9% respectively, are far and away the leaders among the surveyed companies in self-service. On the other hand, Getty at 47.0% and Sunoco at 43.4% still have more full-service stations than the others surveyed. The fence-straddling split-islanders include Chevron at 84.2%, Exxon at 73.9%, Shell at 71.5%, Mobil at 69.7%, Union at 69.3% and Amoco at 62.7%.

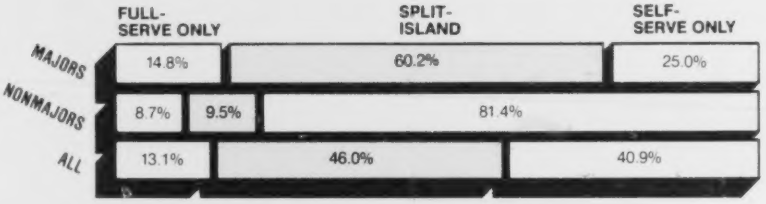
- There are many variations in the grades of gasolines the surveyed companies sell at their stations.

For example: Only 10% of the companies still sell leaded premium gasoline—the majors 8.0% as a group and the non-majors 15.8% as a group. But 72.6% of the companies sell the three key grades—leaded regular, unleaded regular and unleaded premium. The strongest majors in the three-grade configuration were Standard of Ohio at 100%, Shell at 98.2% and Chevron at 96.3%. Also in the 90%-plus category were Amoco, Arco, BP, Exxon, Gulf, Mobil and Sunoco.

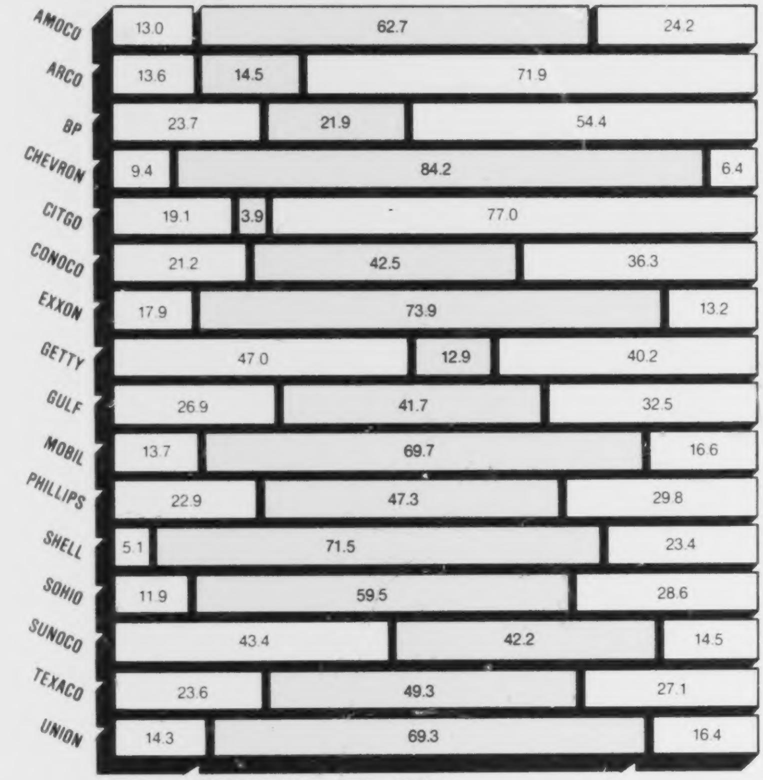
On the other side of the spectrum there were five companies that were substantially two-graders—"Union and Getty, because they decided to go that way, and Phillips, Conoco and Citgo, mainly because their jobbers did," according to Lundberg.

- Diesel fuel's luster seems to be fading with respect to predictions that were made for it in the mid-to-late '70s. Of the surveyed stations, only 17.7% handled diesel fuel—15.4% in the major category, 23.4% in the non-major. The biggest supporters were Phillips at 46.9% of its stations, Texaco at 36.2%, Gulf at 35.7% and Conoco at 34.5%. Least interested were Shell at 4.9%, Arco and Mobil at 6.3%, BP at 8.8% and Getty at 9.8%.

How the Top Companies Market Gasoline



By Individual companies



Source: Lundberg Survey, Inc., January 1984

- There are a lot more service bays than most people realize. Says Lundberg: "Many of these bays are not being utilized efficiently, but there are impressively large numbers of them still out there in the service station networks."

The study indicated 57.6% of the companies surveyed have service bays, of which the major stations have 72.1% and the non-majors 20.9%. Here again, company-by-company differences are almost dramatic. Union, Chevron and Mobil are in the 80%-plus category; Exxon, Phillips, Sohio and Texaco in the 70% group; and Amoco, Arco, Getty, Shell and Sunoco in the 60%-plus class. At the short end, BP at 5.3% and Citgo at 23%.

- Of the ancillary businesses—C-stores, car washes and truckstops—the latter two have been around longer, but the C-stores have come on faster. The all-industry figure for C-stores is 7.5%, but the non-majors tower above the majors in this category in their interest—16.9% to 3.8%.

Leader of them all is Citgo with 32.2% of its stations involved with C-stores. Arco is second with 14.8% and Gulf, third with 8.3%. Professing as little interest as possible are Exxon at 0.7%; Getty at 0.8%; Sunoco at 0.9%; Chevron at 1.9%; Union at 1.9% and Mobil at 2.0%.

Says Lundberg: "The face of gasoline marketing has become complicated and interesting in response to economic changes. Since many challenges remain, further diversity seems likely."

Self-Service Gains, Unleaded Surges Into Lead

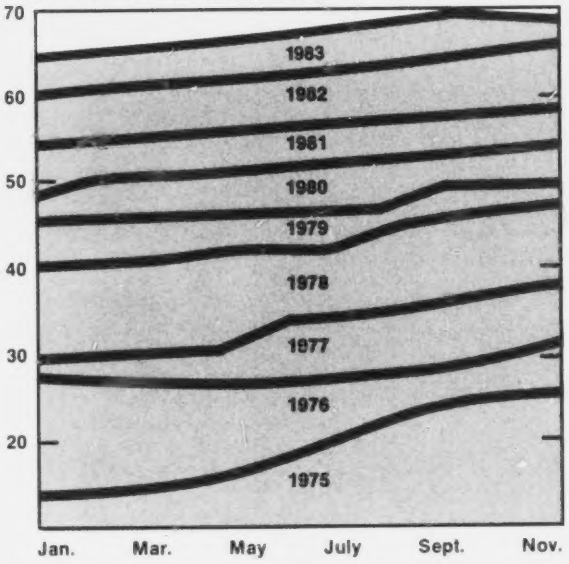
In the past few years, self-service has become far and away the most popular way to market gasoline in the U.S.

An Amoco Oil Co. internal report [below] says self-service is preferred by about 70% of motorists nationwide in 1983. Self-serve popularity has never flagged since it passed the 50% mark in 1980. The Amoco figures come from a regular poll of its motorist/customers.

Lundberg Letter figures [bottom], which are based on sales volume, were even higher. Lundberg indicates that self-service accounted for nearly 73% of sales by the end of last year.

A number of things were changing in marketing in 1983, according to Lundberg. For the first time, unleaded regular won the volume race with 43.0% to leaded regular's 42.9%. Premium unleaded continued to gain, and finished with 13.4% of the market.

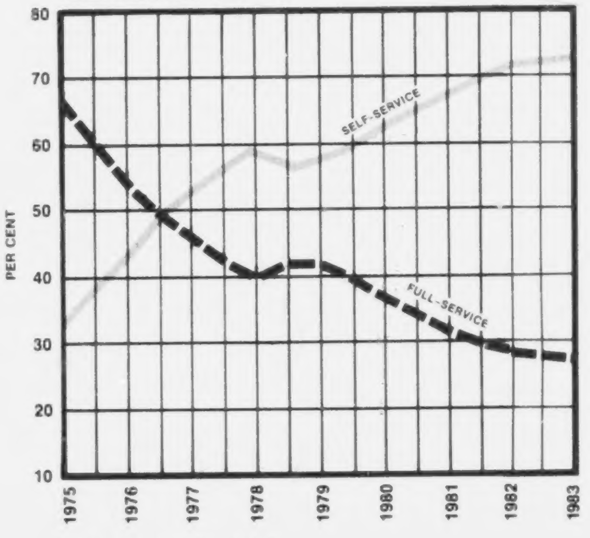
U.S. Self—Serve Motorist Gasoline Market Share (%)



State(a)	%	State(a)	%
Utah	91	Iowa	73
Arizona	86	Maryland	73
New Mexico	86	Missouri	73
Colorado	85	Minnesota	71
South Carolina	83	Alabama	70
Texas	83	Delaware	70
Washington	82	Mississippi	70
California	81	Ohio	70
Nevada	81	Wyoming	69
Wisconsin	81	Kansas	65
Florida	80	Kentucky	65
North Carolina	80	Nebraska	65
Georgia	79	South Dakota	65
Idaho	79	North Dakota	62
Oklahoma	78	West Virginia	62
Virginia	78	Connecticut	57
Illinois	77	Pennsylvania	52
Montana	77	New Hampshire	48
Indiana	76	Rhode Island	48
Louisiana	76	New York	47
Michigan	74	Vermont	38
Tennessee	74	Massachusetts	36
Arkansas	73	Maine	27
D.C.	73		

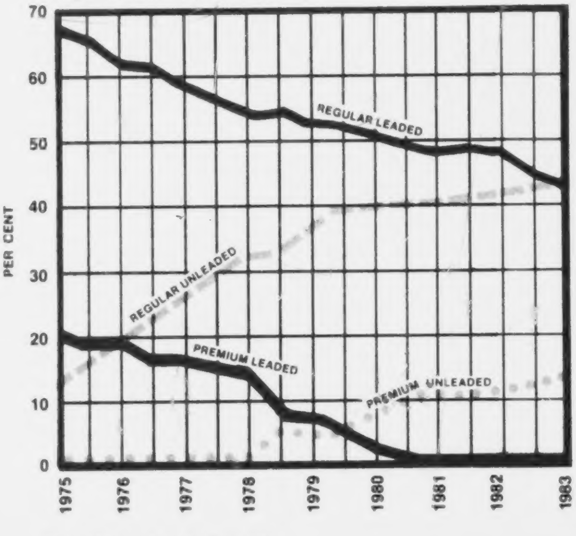
(a)Self-service is illegal in New Jersey and Oregon.
Source: Amoco Oil Co., January 1984.

SELF-SERVICE VERSUS
FULL-SERVICE, 1975-1983



Source: Lundberg Letter, December 1982

HOW GASOLINE MARKET
HAS CHANGED, 1975-1983



Source: Lundberg Letter, December 1982

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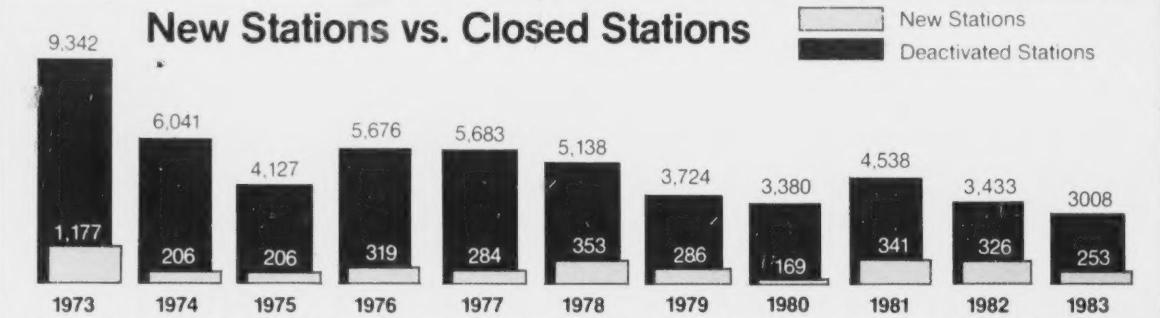
Service Station Shrinkage Slowing?

There are signs that the continuing shrinkage in the national service station population may be nearing an end. The national total, for example, indicates that the reduction in 1984 will be around 6,000 outlets. That's a lot, of course, but it's not nearly as many as had been passing out of the picture annually in recent years.

Data collected by American Petroleum Institute from almost a score and a half of the leading marketing companies shows that the deactivation rate for stations is definitely slowing. In 1983, the number of stations shut down by these companies was barely over 3,000—the lowest this total has been since retrenchment set in after the oil embargo of 1972-73. In 1973, it will be recalled, the top companies alone shuttered well over 9,000 stations.

But while deactivations declined, so did new construction—i.e., construction from the ground up. New stations built dropped down 73 to only 253 in 1983—the lowest that number has been since 1973-74. It must be remembered that this survey takes into account only those stations that are built on completely new sites—it does not include rehabs or new stations that are built on old sites as replacements.



API definitions. A service station is defined as a retail outlet at which 50% of the dollar volume is from gasoline and related products; a newly constructed outlet is defined as one that has been erected completely on vacant land or is new on the site. This category does not include rebuilds. Permanently deactivated outlets are those where equipment and identification have been removed, and where re-opening as a service station is no longer contemplated.

Source: American Petroleum Institute, New Construction Report, May, 1984

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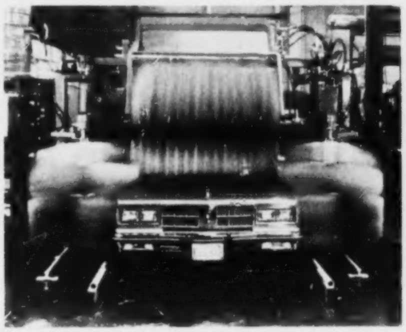

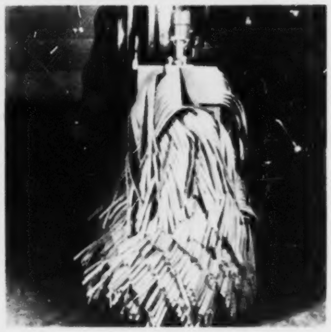

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Business at Service Stations

Dollar Volume

Year	No. of service stations(b)	Total sales (add $000,000,000)	Avg. per station (add $000)
1984	**130,000(a)**	**$106.2**	**$817.0**
1983	136,570(a)	103.6	958.0
1982	144,690(a)	106.2	733.0
1981	151,250(a)	101.7	672.4
1980	158,540(a)	96.3	608.0
1979	164,790(a)	70.9	430.0
1978	172,300(a)	60.9	353.0
1977	176,465(b)	56.5	320.0
1976	186,400(a)	48.0	257.0
1975	189,480(a)	43.8	232.0
1972	226,459(a)	33.7	148.8

(a) Franchising in the Economy 1982-84, U.S. Department of Commerce; data are as of the end of the year.
(b) Bureau of Census definition of gasoline service stations: 50% or more of dollar volume comes from the sale of petroleum products.

Product Sales, Passenger Cars

Year	Privately owned passenger cars (add 000)	Gasoline		Motor oil	
		Avg. gal. per car	Sales (add 000,000 gal.)	Avg. qt. per year	Sales (add 000,000 qt.)
1984	**126,000**	**545**	**68,670**	—	—
1983	125,382	548	68,709	—	—
1982	123,697	561	69,394	7.3	907
1981	123,462	581	71,731	7.3	909
1980	121,723	603	73,399	7.3	907
1979	120,248	664	79,845	7.3	880
1978	116,534	715	83,760	7.6	921
1977	113,696	706	80,269	7.9	900
1976	110,188	711	78,344	8.0	887
1975	106,712	712	75,979	9.5	1,014
1972	96,567	755	72,908	10.0	966

Source: Federal Highway Administration through 1981; NPN estimates for 1982 and thereafter.

Station Customers

Year	No. of service stations	Privately owned passenger cars		Households owning cars		Licensed drivers		Women drivers	
		Total (add 000)	Avg. per station	Total (add 000,000)	Avg. per station	Total (add 000,000)	Avg. per station	Total (add 000,000)	Avg. per station
1984	**130,000**	**126,000**	**969.2**	**74.0**	**569.2**	**153.0**	**1,176.9**	**72.8**	**560.0**
1983	136,570(a)	125,382	918.1	73.0	534.5	152.0	1,112.9	72.3	529.4
1982	144,690(a)	124,821	862.7	72.0	497.6	149.1	1,030.5	70.4	486.6
1981	151,250(a)	123,462	816.3	70.0	460.5	147.0	969.0	69.2	457.5
1980	158,540(a)	121,723	767.8	67.2	423.8	145.3	916.7	68.1	429.5
1979	164,790(a)	120,248	731.1	65.9	400.0	143.3	868.3	66.8	403.5
1978	172,300(a)	116,534	676.3	64.8	375.0	140.8	817.1	65.3	379.0
1977	176,465(a)	113,696	644.3	63.3	365.5	138.4	784.4	63.7	361.0
1976	186,400(a)	110,188	591.1	62.0	332.6	130.3	689.4	57.9	306.3
1975	189,480(a)	106,712	563.2	60.5	319.3	127.8	662.2	56.8	294.3
1972	226,459(b)	96,567	426.4	52.8	232.2	118.4	522.8	52.6	232.3

(a) Franchising in the Economy 1982-84, Department of Commerce.
(b) Bureau of Census definition of gasoline service stations: 50% or more of dollar volume comes from the sale of petroleum products.
Source: Based on data from Motor Vehicle Mfgs. Assn., Federal Highway Administration, and NPN estimates for 1982, 1983 and 1984.

How Stations Rank in Sales (Billions of Dollars)

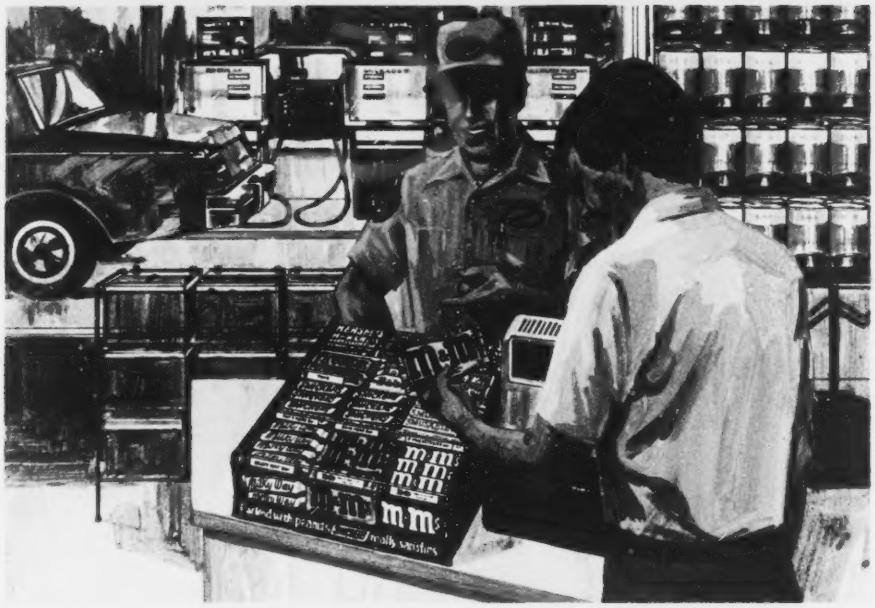
	1983	% Change '83-'82	1982	% Change '82-'81	1981	% Change '81-'80	1980	% Change '80-'79
All Retail Stores	$1,173.2	9.0%	$1,075.6	3.5%	$1,038.8	9.1%	$951.9	6.4%
Food Group	263.2	4.1	252.8	6.4	237.6	9.6	217.0	10.8
Automotive Group	221.2	21.3	182.3	0.8	180.7	11.3	162.3	(8.5)
General Merchandise	140.6	7.1	131.3	3.0	127.5	8.8	117.2	6.8
Eating and Drinking Places	119.8	11.5	107.4	14.1	94.1	9.7	85.8	7.8
Gasoline Service Stations	**104.5**	—	**104.6**	—	**101.7**	**8.7**	**93.6**	**27.9**
Apparel Group	54.8	(8.7)	60.0	25.5	47.8	7.7	44.4	4.7

Source: Survey of Current Business, Department of Commerce, Vol. 64, No. 2, February, 1984

Personal Consumption Expenditures

	(Billions of Dollars)					Seasonally Adjusted at Annual Rate—1983			
	1983	% Change '83-'82	1982	% Change '82-'81	1981	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.
Total Expenditures	$2,158.6	8.4%	$1,991.9	7.0%	$1,843.2	$2,073.0	$2,147.0	$2,181.0	$2,233.1
Durable Goods	278.6	13.9	244.5	3.5	234.6	258.5	277.7	282.0	295.2
Automobiles	132.8	20.8	109.9	7.7	98.6	118.4	133.8	135.6	143.2
Furniture	101.8	8.9	93.5	(0.7)	93.4	97.3	100.8	102.9	106.4
Other Durable	44.0	7.1	41.1	2.6	42.6	42.9	43.1	44.3	45.7
Nondurable Goods	804.3	5.7	761.0	3.8	734.5	771.1	799.6	814.8	825.9
Food	422.5	14.2	369.9	6.0	375.3	411.7	419.6	426.4	432.4
Clothing and Dress	125.6	5.5	119.0	3.5	114.6	120.0	126.4	125.1	130.9
Gasoline and Oil	**90.6**	**(1.0)**	**91.5**	**(3.0)**	**96.8**	**87.3**	**90.3**	**93.1**	**91.6**
Other Nondurable goods	165.7	7.9	153.5	NA	NA	158.1	168.3	170.2	171.1
Fuel Oil and Coal	20.9	—	20.0	10.7	19.7	17.1	21.2	23.0	21.6
Other Nondurable	144.8	8.5	133.5	3.0	147.9	140.4	142.1	147.2	149.5
Services	1,075.7	9.1	986.4	10.6	874.1	1,037.4	1,069.7	1,083.5	1,112.0

Source: Survey of Current Business, Department of Commerce, Vol. 64, No. 1, January, 1984



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Convenience Store Growth Skyrockets in '83

Aided by normal growth and by reassessment of its population, the convenience store industry took on surprisingly broader dimensions in 1983.

By the end of the year, according to John F. Roscoe, an industry analyst whose "Dollars Per Day Survey of the Convenience Store Industry" is winning increasing recognition, 59% of C-stores were selling gasoline, moving an average of 1,101 gal. of gasoline per day per store, and commanding 12.09% of the national market.

Not only that, he says, by the end of 1985 the growth will be even more phenomenal—he expects C-stores to be selling more than 20% of the gasoline vended across the nation.

By way of comparison, all this growth has taken place in little more than a decade.

There were only 1,500 C-stores in the country in the early 1960s, according to the National Assn. of Convenience Stores. Gasoline sales were so insignificant that no one kept track.

Through 1981, the C-store industry loosely estimated its population at "around 35,000 to 40,000"—no one was sure. But last year, the NACS and the key industry publications all came to the conclusion that the population currently is in excess of 51,000 stores. This 15,000-store increase thus inflated the 1983 total and raised percentage comparisons almost disproportionally in looking back at the earlier years.

Roscoe's first survey, made in 1974, estimated that only one out of five C-stores were selling gasoline then. In 1983, he calculates, six out of 10 were selling motor fuels—all grades, and diesel too.

One C-store chain, Southland Corp., is the nation's largest independent gasoline marketer. In 1983, it bought a refinery and most of the marketing apparatus of Cities Service from Occidental Petroleum. Southland sold well over 1.5-billion gal. of gasoline in 1983 through its more than 3,000 stores.

Getting hard numbers on how many jobbers are in the C-store business is difficult. But Mike Scanlon of the National Oil Jobbers Council estimates that 40% of the council's jobber members own C-stores. Between 1980 and 1982, he says, the number of jobber/members owning C-stores swelled from 7,500 to almost 9,000. As a matter of fact, he says, just about all of the members of NOJC carry and sell items that would not normally fall into the category of petroleum products or related TBA items.

The federal government also makes some studies and projections on convenience stores and gasoline operations. But the federal study limits itself to franchised establishments. Thus, its totals reflect only about 30% to 35% of the 51,000 population that all other sources generally credit the industry with having.

The latest government report (see table) confirms that the trend is upward and that sales are booming. This report projects sales of $10.2-billion for 15,000 franchised stores in 1983, and $11.3-billion for 15,818 franchised stores in 1984.

Roscoe's report basically covers the top 10 publicly owned chains and he noted that in 1982, the 10 public chains sold 2.3-billion gal. of gasoline, which was 2.36% of the 98.5-billion gallons vended for highway use.

The entire C-store universe sold 12.9% of the gasoline sold in the U.S. in 1982, and Roscoe estimates that in 1985 20% of gasoline sales will be through this type of unit. In 1976, only 1% of the total gasoline sold in the United States was sold through convenience stores.

In his annual ranking of the 10 stores used in his survey, Roscoe—who owns a small chain in California—gave first place to 415-store Shop & Go, of Mango, Fla. Second place went to Circle K, Phoenix, Ariz., 1,221 stores; third place, Southland Corp., Dallas, Texas, 7,165 stores; fourth place, National Convenience Stores, Houston, Texas, 1,012 stores; and fifth place, Lil' Champ Food Stores, Jacksonville, Fla., 170 stores.

The 10 chains had a total of 12,276 stores, of which 6,029 sold gasoline. The 10 added 480 gasoline units in 1982, Roscoe says.

Dollars Per Day Survey

Company	# of Gasoline Units	Gal. Sold in 1982 (Add 000)	Avg. Gal. Sold per Day per Unit	Gasoline Margin per Gal.	% of Sales Contributed by Gasoline
Shop & Go	286	74.000	689	3.8c	33.9%
Circle K	798	255.200	886	N.A.	38.4%
Southland	2.827	1.156.000	1,185	N.A.	25.3%
Nat'l Convenience	695	231,600	991	6.2c	42.7%
Lil Champ	82	19,444	722	3.4c	31.0%
Li'l General	208	43,912	580	N.A.	29.9%
Mini Mart	41	8,361	580	N.A.	21.8%
Sunshine Jr.	322	66,608	580	N.A.	51.1%
Conna	289	146,000	1,387	N.A.	39.4%
Munford	481	327,000	1,887	N.A.	56.3%
Totals	**6,029**	**2,328,127**	**1,101**		

Source: John F. Roscoe, 13th annual Dollars-per-Day Survey—1984.

Ten-Year Box Score on Growth

Survey Year	No. of Stores	Net Growth	No. with Gasoline Units	Gasoline Units Added in Year	% of Stores with Gasoline Units
1983 (a)	12.276	—	6.029	480	49.11%
1982	12.400	107	5.799	393	46.76
1981	12.445	205	5.533	442	44.45
1980	13,167	247	5,630	447	42.76
1979	12.920	313	5,153	569	39.88
1978	12.597	644	4.584	792	36.38
1977	11,953	360	2,792	959	31.72
1976	11.356	672	2.786	557	24.53
1975	10.143	928	2,147	194	21.16
1974	9.258	1,042	1.964	—	21.21

(a) Ten chains in this survey versus 11 chains in the previous study.
Source: 13th annual Dollars-Per-Day Survey, John F. Roscoe, 1984.

Government Franchise Projections

Item	1982	1983	1984	Percent Changes 1982-83	Percent Changes 1983-84
Total number of establishments	15.818	15.086	15.867	- 4.6	5.2
Company-owned	9.517	8.436	8.821	-11.4	4.6
Franchisee-owned	6.301	6.650	7.046	5.5	6.0
Total sales of products and services ($000)	9.817.511	10.176.635	11.278.850	3.7	10.8
Company-owned	6.119.318	6.094.418	6.760.169	- 0.4	10.9
Franchisee-owned	3.698.193	4.082.217	4.518.681	10.4	10.7

Distribution by Establishments—1982

Size Groups	Franchising Companies Number	Establishments Number	Establishments %	Sales ($000)	Sales %
Total	**30**	**15,818**	**100.0**	**9,817,511**	**100.0**
1001 and Greater	3	9.161	57.9	6.840.459	69.7
501 - 1000	4	3.641	23.0	1.617.906	16.5
151 - 500	7	2.349	14.9	1.092.488	11.1
51 - 150	6	484	3.1	175.864	1.8
11 - 50	7	165	1.0	81.654	0.8
0 - 10	3	18	0.1	9.140	0.1

Source: "Franchising in The Economy, 1982-84," U.S. Department of Commerce, January 1984.

Convenience Store Population—1982

	Population (Add 000)	Households (Add 000)	Super-markets	No. of C-stores	% of C-stores selling gasoline	Population per C-store	Households per C-store
New England	**12,276**	**4,468**	**1,409**	**1,784**	**36.0**	**6,881**	**2,505**
Maine	1,150	416	139	130	35.8	8,846	3,200
New Hampshire	971	352	139	116	55.9	8,371	3,035
Vermont	526	189	81	43	71.6	12,233	4,395
Massachusetts	5,615	2,049	566	920	25.3	6,103	2,227
Rhode Island	955	352	87	155	34.1	6,161	2,271
Connecticut	3,059	1,110	397	420	51.0	7,283	2,643
Middle Atlantic	**36,721**	**13,477**	**3,840**	**3,582**	**37.1**	**10,252**	**3,762**
New York	17,408	6,470	1,807	971	52.4	17,928	6,663
New Jersey	7,323	2,612	674	1,106	8.0	6,621	2,362
Pennsylvania	11,990	4,395	1,359	1,505	48.7	7,967	2,920
East North Central	**42,224**	**15,298**	**5,060**	**4,731**	**32.6**	**8,925**	**3,234**
Ohio	10,919	3,994	1,349	1,971	23.7	5,540	2,026
Indiana	5,548	2,007	752	579	56.0	9,582	3,466
Illinois	11,612	4,236	1,203	834	29.4	13,923	5,079
Michigan	9,338	3,321	1,044	816	40.0	11,444	4,070
Wisconsin	4,807	1,740	712	531	33.9	9,053	3,277
West North Central	**17,404**	**6,475**	**2,287**	**2,635**	**46.6**	**6,605**	**2,457**
Minnesota	4,145	1,512	495	723	27.3	5,733	2,091
Iowa	2,955	1,101	370	532	54.0	5,555	2,070
Missouri	4,862	1,827	672	613	44.1	7,932	2,980
North Dakota	667	240	81	67	26.9	9,955	3,582
South Dakota	704	255	89	90	61.1	7,822	2,833
Nebraska	1,621	608	216	196	60.2	8,270	3,102
Kansas	2,450	932	364	414	68.6	5,918	2,251
South Atlantic	**38,333**	**14,067**	**5,145**	**9,695**	**56.1**	**3,954**	**1,451**
Delaware	606	218	67	109	41.3	5,560	2,000
Maryland	4,350	1,554	450	571	32.1	7,618	2,722
District of Columbia	613	251	40	108	27.8	5,676	2,324
Virginia	5,474	1,965	707	1,168	40.0	4,687	1,682
West Virginia	1,951	706	268	314	35.0	6,213	2,248
North Carolina	5,915	2,117	994	1,443	70.9	4,099	1,467
South Carolina	3,182	1,083	509	879	72.8	3,620	1,232
Georgia	5,735	2,024	767	1,486	65.8	3,859	1,362
Florida	10,507	4,149	1,345	3,617	54.3	2,905	1,147
East South Central	**14,983**	**5,309**	**2,074**	**3,231**	**68.2**	**4,637**	**1,643**
Kentucky	3,716	1,320	521	700	77.1	5,309	1,886
Tennessee	4,695	1,697	625	1,050	61.1	4,471	1,616
Alabama	4,006	1,424	543	865	75.1	4,631	1,646
Mississippi	2,566	868	385	616	60.4	4,166	1,409
West South Central	**24,811**	**8,916**	**3,324**	**6,908**	**55.8**	**3,592**	**1,291**
Arkansas	2,379	877	341	430	74.4	5,533	2,040
Louisiana	4,294	1,484	553	860	48.8	4,993	1,726
Oklahoma	3,217	1,226	457	1,172	67.4	2,745	1,046
Texas	14,921	5,329	1,973	4,446	52.3	3,356	1,199
Mountain	**12,145**	**4,391**	**1,621**	**2,607**	**54.2**	**4,659**	**1,684**
Montana	802	298	129	220	56.4	3,646	1,355
Idaho	970	344	185	152	61.2	6,382	2,263
Wyoming	529	192	83	106	47.2	4,991	1,811
Colorado	3,055	1,156	325	539	46.4	5,668	2,145
New Mexico	1,331	465	175	354	61.6	3,760	1,314
Arizona	3,004	1,092	396	828	58.5	3,628	1,319
Utah	1,555	492	205	230	48.7	6,761	2,139
Nevada	899	352	123	178	46.1	5,051	1,978
Pacific	**33,674**	**12,641**	**4,188**	**3,527**	**32.6**	**9,547**	**3,584**
Washington	4,566	1,754	688	491	43.4	9,299	3,572
Oregon	2,734	1,060	452	423	24.8	6,463	2,506
California	25,026	9,404	2,867	2,462	32.1	10,165	3,820
Hawaii	917	286	115	74	20.3	12,392	3,865
Alaska	431	137	66	77	32.5	5,597	1,779
Total	**232,571**	**85,042**	**28,950**	**38,700**	**48.6**	**6,010**	**2,197**

Source: C-Store Business, Research and Data Center, October 1983.

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Self Serve
1.29 9
Self Serve
1.29

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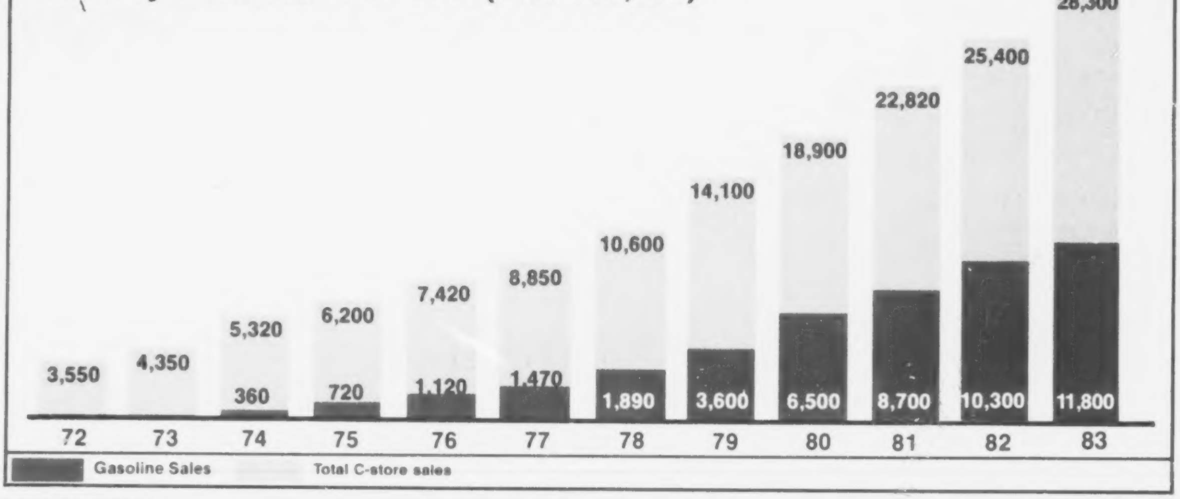
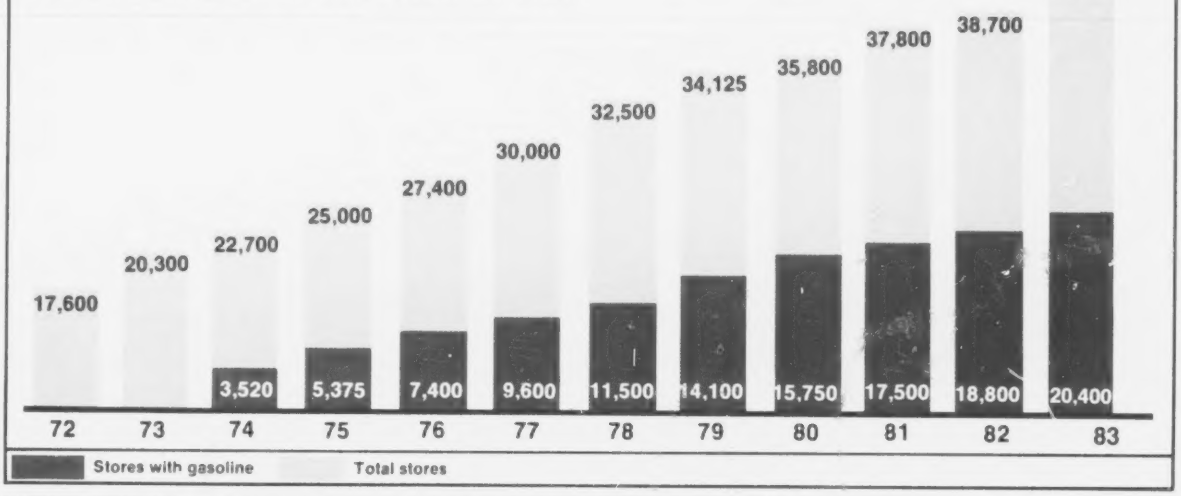
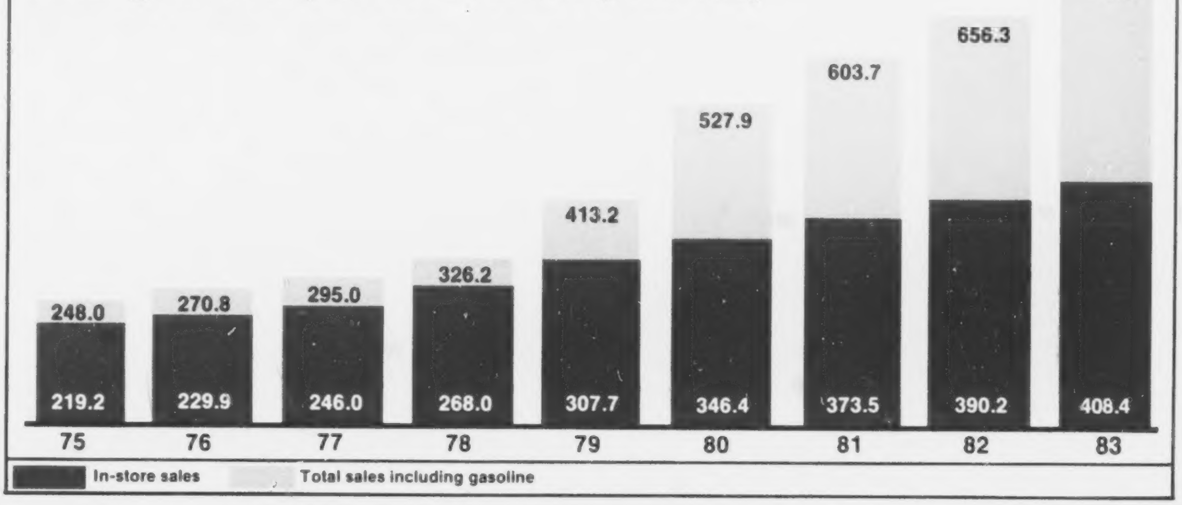
Sales by C-Stores 1972-1983 (Add 000,000)



Total number of C-stores in U.S.



Average annual per store volume (Add 000)



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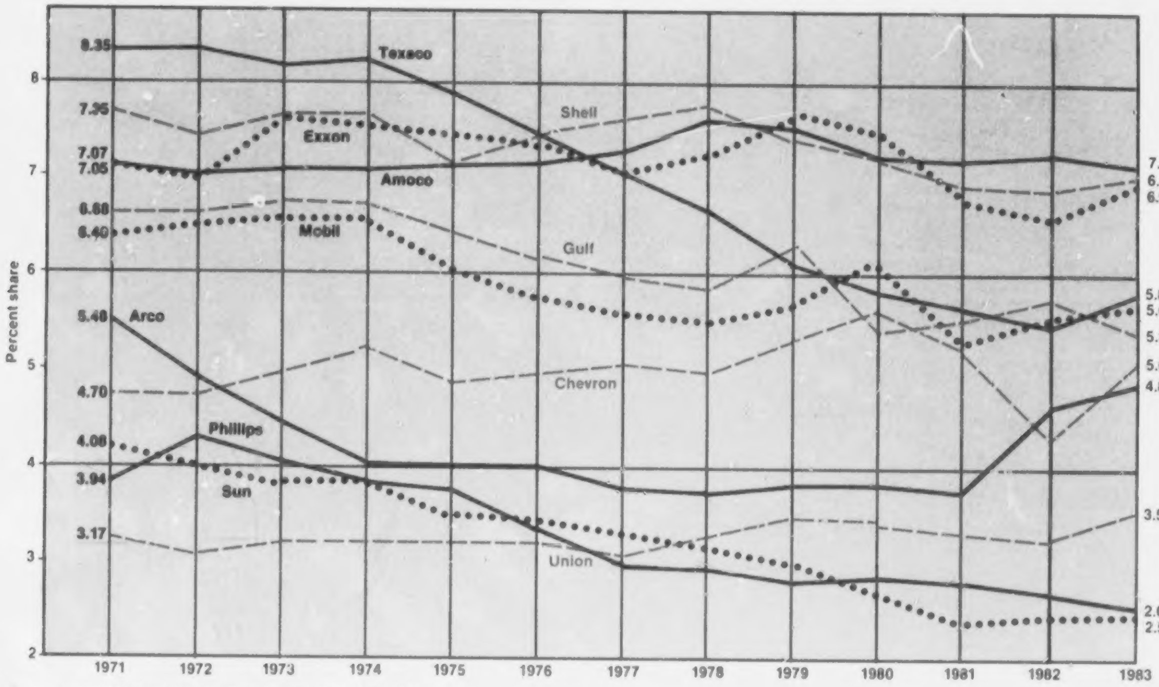


Source: Lundberg Survey, Inc., North Hollywood, Calif., April 1983

Amoco Retains Share of Market Lead, But No. 2 Shell and No. 3 Exxon Close In

Even though it lost some market share in 1983, Amoco maintained a slim lead and finished again as the nation's No. 1 gasoline marketer.

Shell and Exxon held onto second and third place, ending up less than 0.07% apart and only 0.33% behind the leader.

Texaco jumped up two notches, after gaining market share for the first time since 1974. Mobil, Chevron, Union and Sun also gained, and Arco continued its rapid rise.

Lundberg Survey, Inc., which keeps the tabs on gasoline consumption in the various states and on a company-by-company basis, is the prime authority for statistics on market shares. The illustration above shows the share trends over the past 12 years. Another set of illustrations in this share-of-market report puts special focus on the eight leaders over the past four years. [See page 118.]

Lundberg's report for 1983 said Amoco had a 7.23% share of the market for that calendar period. Shell had 6.97% and Exxon 6.90%. Gulf, which had been in fourth place in 1982, fell to sixth in 1983, going by Texaco (fourth) and Mobil (fifth) on the way down. Chevron reversed a two-year decline, but still finished in seventh place. Arco, Union, Phillips and Sun (in order) rounded out the list.

Lundberg also noted that total gasoline consumption increased in 1983 for the first time in five years. 1983's 101,544,495,000 gal. was a 0.84% increase over 1982. The peak year for gasoline consumption was 1978 with around 115,323,000,000 gal. consumed.

Market-share reports are shown in the functional classification developed by Lundberg Survey in 1974. Companies are sorted in six categories identified by Roman numerals I through VI. They are defined as follows:

I. Integrated Marketers—Produce, refine, transport, and market in interstate commerce. Recognized in the petroleum industry as major companies in all of the states or regions in which they market with their own brand or brands.

II. Other Integrated Marketers—Transport and/or market in interstate commerce. Produce and refine also, but one or the other of these functions may be a less substantial part of the overall operation. Market in more than one state with their own brand or brands or supply private brands.

III. Suppliers—Transport and/or market in interstate commerce. May market directly and/or indirectly. May produce and/or refine, but neither function is a substantial part of the overall operation. Distributive functions are supported by exchanges or buying leverage.

IV. Marketers—Operate as autonomous entities, are not affiliated with supplying companies, and do not use suppliers' brands, bulk plants, or other facilities. May make accommodation sales to fellow Category IV marketers, but do not normally function as suppliers.

V. Cooperatives—Generally serve nonretail ranchers and farmers, although some engage in branded sales with pumps open to the public. May or may not be integrated.

VI. Miscellaneous and Unidentified—Unbranded, nonmarketing operations reporting net-taxable gallonages. Also sales unidentified as to category or brand.

National and state reports are based on all known source data for all petroleum marketers in the respective states. The national is an aggregate of the states.

Lundberg Survey reports that data are obtained in a variety of ways, principally from state tax-collecting agencies, but also by direct inquiry.

Lundberg Survey sells state and regional market-share reports by the month on a subscription basis. The company's principal business is retail gasoline surveys, which the firm produces on representative cities across the nation.

National and Regional Market Shares of Motor Gasoline

Share of the U.S. Market 1983 Versus 1982

	National Taxable Sales				National Market Share		
			Change				
	1983 (000)	1982 (000)	(000)	%	1983 %	1982 %	Change in Share
I Integrated							
Amoco	7,341,781	7,368,014	-26,233	-0.36	7.23	7.32	-0.09
Shell	7,079,647	6,817,396	262,251	3.70	6.97	6.77	0.20
Exxon	7,010,358	6,796,265	214,093	3.05	6.90	6.75	0.15
Texaco	5,894,717	5,657,506	237,211	4.02	5.80	5.62	0.19
Mobil	5,773,766	5,721,607	52,159	0.90	5.69	5.68	0.00
Gulf	5,382,735	5,819,017	-436,282	-8.11	5.30	5.78	-0.48
Chevron	5,143,314	4,873,138	270,176	5.25	5.06	4.84	0.23
Arco	4,895,085	4,671,323	223,762	4.57	4.82	4.64	0.18
Union	3,573,944	3,333,610	240,334	6.72	3.52	3.31	0.21
Phillips	2,645,521	2,791,099	-145,578	-5.50	2.61	2.77	-0.17
Sun	2,583,367	2,663,357	-79,990	-3.10	2.54	2.64	-0.10
Total (Top 11)	**57,324,235**	**56,512,332**	**811,903**	**1.42**	**56.45**	**56.12**	**0.33**
Others in Class I	7,454,497	7,502,722	-48,225	-0.65	7.34	7.45	-0.11
Total	**64,778,732**	**64,015,054**	**763,678**	**1.18**	**63.79**	**63.57**	**0.22**
II Other Integrated	—	—	—	—	—	—	—
III Suppliers	—	—	—	—	—	—	—
IV Marketers	—	—	—	—	—	—	—
V Cooperatives	—	—	—	—	—	—	—
VI Miscellaneous	—	—	—	—	—	—	—
Total (II-VI)	**36,775,763**	**36,684,337**	**91,426**	**0.25**	**36.21**	**36.43**	**-27.36**
Grand Total U.S.	**101,554,495**	**100,699,391**	**855,104**	**0.84**	**100.00**	**100.00**	—

Note: Cities Service is included in Class I for the year 1982 only.
Source: Lundberg Survey, Inc.

By PAD Districts

	PAD Districts Taxable Sales				National Market Share		
			Change				
	1983 (000)	1982 (000)	(000)	%	1983 %	1982 %	Change in Share
Pad I							
Class I (Integrated)	25,077,027	25,580,138	503,111	2.01	24.69	25.40	-0.71
All Other	11,001,382	9,107,620	1,893,762	17.21	10.83	9.04	1.79
Total	**36,078,409**	**35,598,141**	**480,268**	**1.33**	**35.53**	**35.35**	**0.18**
PAD 2							
Class I (Integrated)	16,876,958	17,621,906	744,948	4.41	16.62	17.50	-0.88
All Other	13,950,482	12,750,132	1,200,350	8.60	13.74	12.66	1.08
Total	**30,827,440**	**30,854,294**	**26,854**	**0.09**	**30.36**	**30.64**	**-0.28**
PAD 3							
Class I (Integrated)	8,462,733	8,594,440	131,707	1.56	8.33	8.53	-0.20
All Other	6,421,861	6,095,820	326,041	5.08	6.32	6.05	0.27
Total	**14,884,594**	**14,925,173**	**40,579**	**0.27**	**14.66**	**14.82**	**-0.16**
PAD 4							
Class I (Integrated)	1,482,149	1,446,825	35,324	2.38	1.46	1.44	0.02
All Other	1,756,515	1,868,707	112,192	6.39	1.73	1.86	-0.13
Total	**3,238,664**	**3,315,532**	**76,868**	**2.37**	**3.19**	**3.29**	**-0.10**
Pad 5							
Class I (Integrated)	12,867,506	12,399,297	468,209	3.64	12.67	12.31	0.36
All Other	3,628,425	3,606,953	21,472	0.59	3.57	3.58	-0.01
Total	**16,495,931**	**16,006,250**	**489,681**	**2.97**	**16.24**	**15.90**	**0.35**

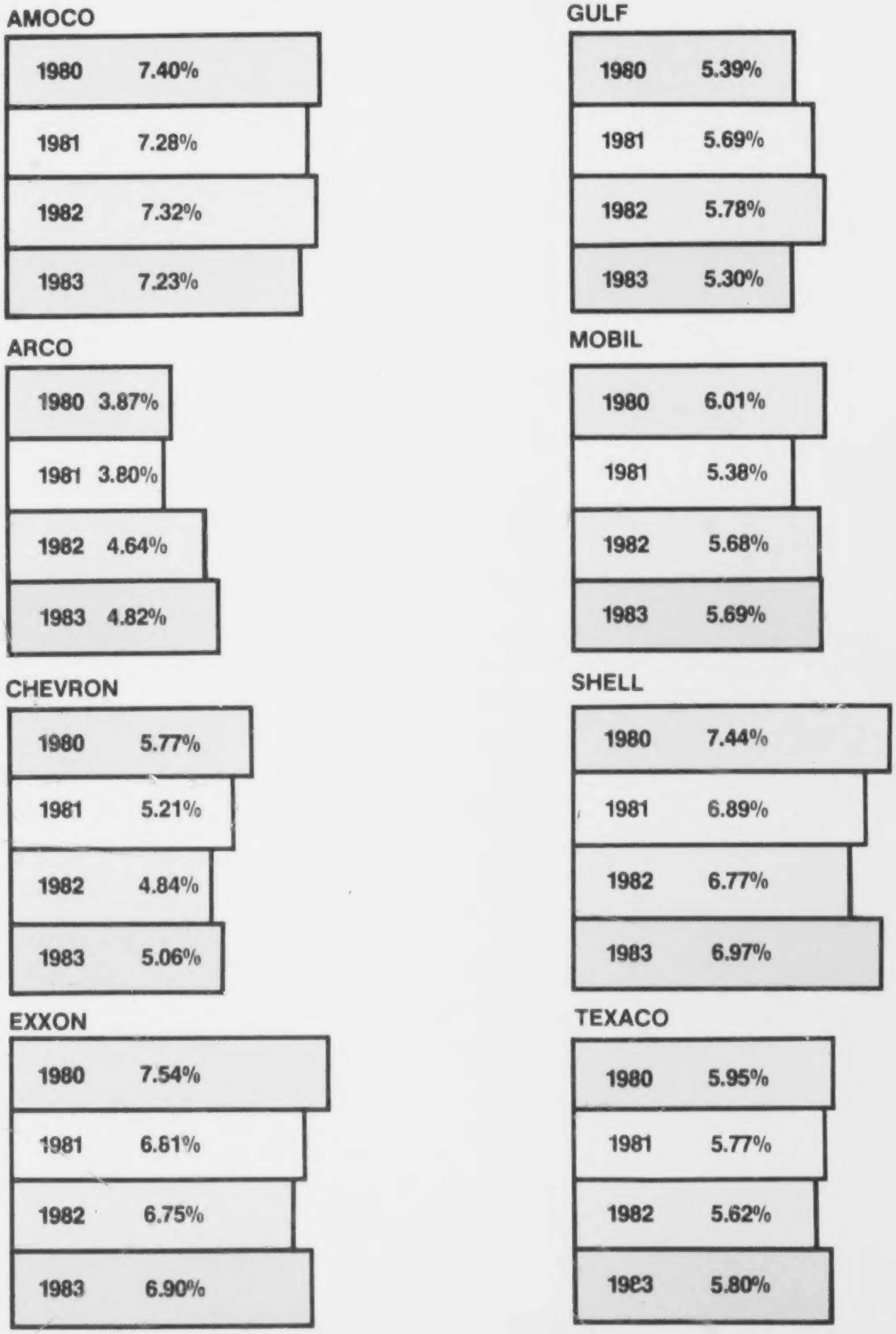
Note: Cities Service is included in Class I for the year 1982 only.
Source: Lundberg Survey, Inc.

Top 11 Marketers: A Seven-Year Overview

	1983		1982		1981		1980		1979		1978		1977	
	Rank	% Share	Rank	% Share	Rank	% Share	Rank	% Share	Rank	% Share	Rank	% Share	Rank	% Share
Amoco	1	7.23	1	7.32	1	7.28	3	7.40	2	7.48	2	7.70	2	7.30
Shell	2	6.97	2	6.77	2	6.89	2	7.44	3	7.30	1	7.71	1	7.53
Exxon	3	6.90	3	6.75	3	6.81	1	7.54	1	7.65	3	7.28	3	7.14
Texaco	4	5.80	6	5.62	4	5.77	5	5.95	5	6.01	4	6.75	4	7.11
Mobil	5	5.69	5	5.68	6	5.38	4	6.01	6	5.78	6	5.55	6	5.59
Gulf	6	5.30	4	5.78	5	5.69	7	5.39	4	6.36	5	5.83	5	5.91
Chevron	7	5.06	8	4.84	7	5.21	6	5.77	7	5.30	7	4.76	7	4.75
Arco	8	4.82	7	4.64	8	3.80	8	3.87	8	3.89	8	3.79	8	3.85
Union	9	3.52	9	3.31	9	3.31	9	3.50	9	3.49	9	3.28	11	3.08
Phillips	10	2.61	10	2.77	10	2.88	10	2.83	11	2.85	11	3.02	10	3.15
Sun	11	2.54	11	2.64	11	2.55	11	2.74	10	3.01	10	3.20	9	3.39

Source: Lundberg Survey, Inc., May 1983 and prior reports.

The Top Eight: The Last Four Years



Market Shares in Certain Metropolitan Areas

This is the first in a new series of share-of-market studies which NPN Factbook hopes to continue indefinitely. Data for the studies were provided by a national market research firm whose integrity and reputation are unimpeachable. This data is for major metropolitan market areas only. Next year, we will expand the listing to cover more markets.

Boston

(completed 1st half of 1983)

Majors		Independents	
Mobil	12%	BP	6%
Arco	10%	Old Colony	3%
Sun	10%	Gibbs	3%
Shell	7%	Merit	2%
Exxon	7%		

Camden, N.J.

(completed 1st half of 1984)

Majors		Independents	
Arco	24%	Hess	3%
Exxon	9%	Merit	2%
Mobil	9%	Discount Gas	1%
Texaco	8%	Star	1%

Philadelphia

(completed 1st half of 1984)

Majors		Independents	
Arco	22%	Merit	3%
Sun	13%	Hess	2%
Exxon	10%	Alert	1%
Amoco	8%		
Gulf	8%		

Wilmington, Del.

(completed 1st half of 1984)

Majors		Independents	
Arco	22%	Merit	2%
Exxon	19%	Jet	1%
Gulf	11%	7-Eleven	1%
Mobil	7%	Alert	1%
Texaco	7%		
Sun	7%		

Washington, D.C.

(completed 1st half of 1984)

Majors		Independents	
Amoco	19%	Crown	3%
Exxon	19%		
Shell	13%		
Texaco	7%		
Gulf	7%		

Miami

(completed 2nd half of 1983)

Majors		Independents	
Amoco	18%	Hess	3%
Shell	12%	Direct	1%
Gulf	7%		
Chevron	7%		
Exxon	6%		

Chicago

(completed 2nd half of 1983)

Majors		Independents	
Amoco	22%	Clark	3%
Shell	15%	Cheker	2%
Arco	12%		
Citgo	7%		

Denver

(completed 2nd half of 1983)

Majors		Independents	
Amoco	14%	Vickers	9%
Conoco	7%	Pester	6%
Phillips	5%	7-Eleven	5%
Texaco	5%	Shamrock	5%

New Orleans

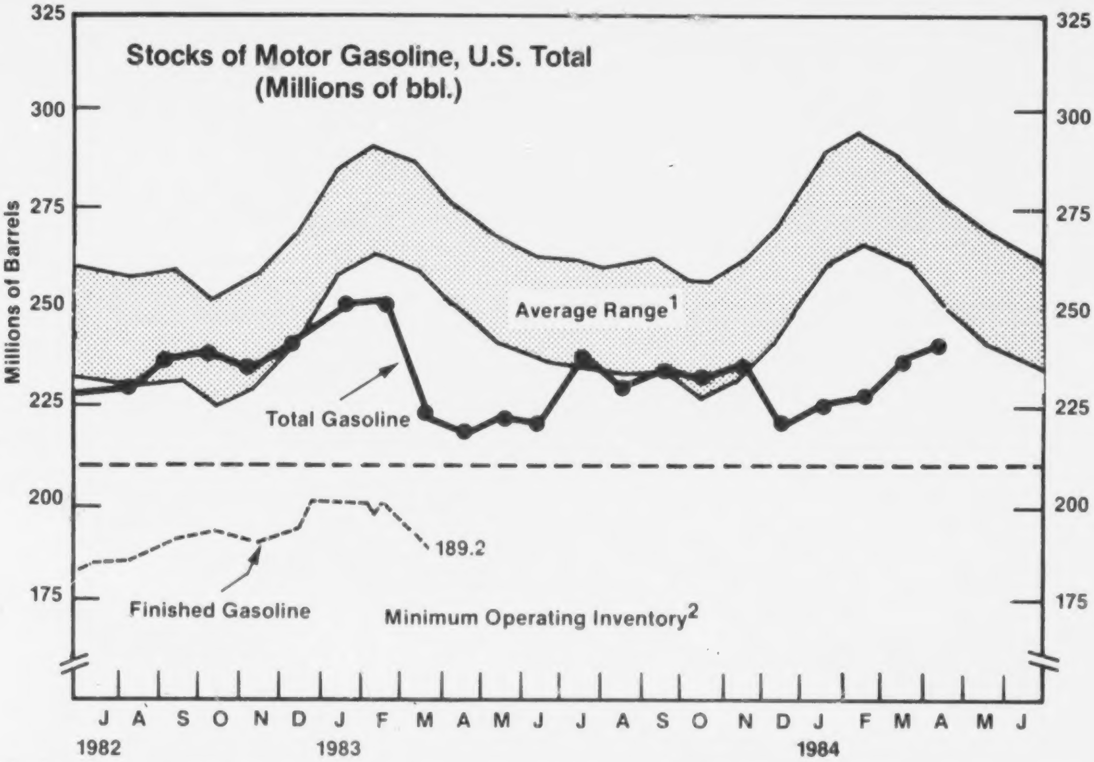
(completed 2nd half of 1983)

Majors		Independents	
Shell	22%	Spur	2%
Exxon	12%	Vickers	2%
Gulf	12%	ECOL	2%
Tenneco	11%	7-Eleven	2%
Amoco	10%		
Texaco	9%		

Houston

(completed 1st half of 1984)

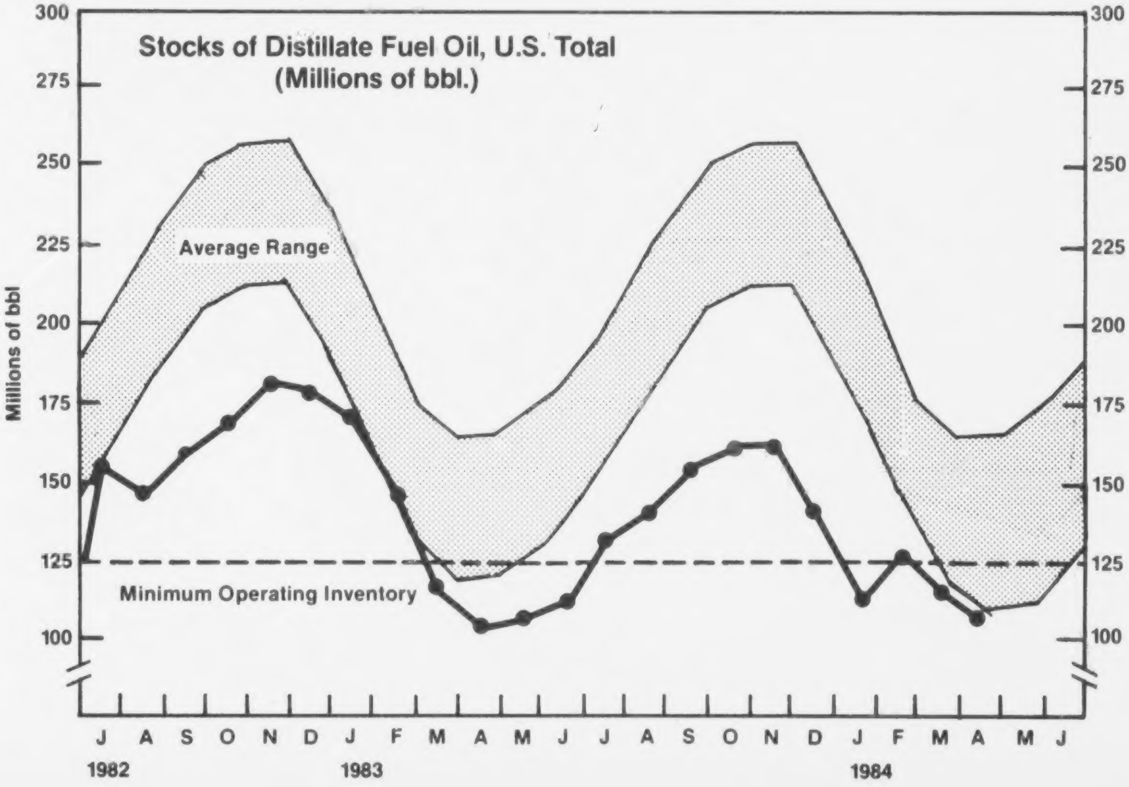
Majors		Independents	
Gulf	20%	Shamrock	9%
Exxon	16%	7-Eleven	4%
Shell	10%	Stop-n-Go	3%
Texaco	8%	Tenneco	3%
		Citgo	2%



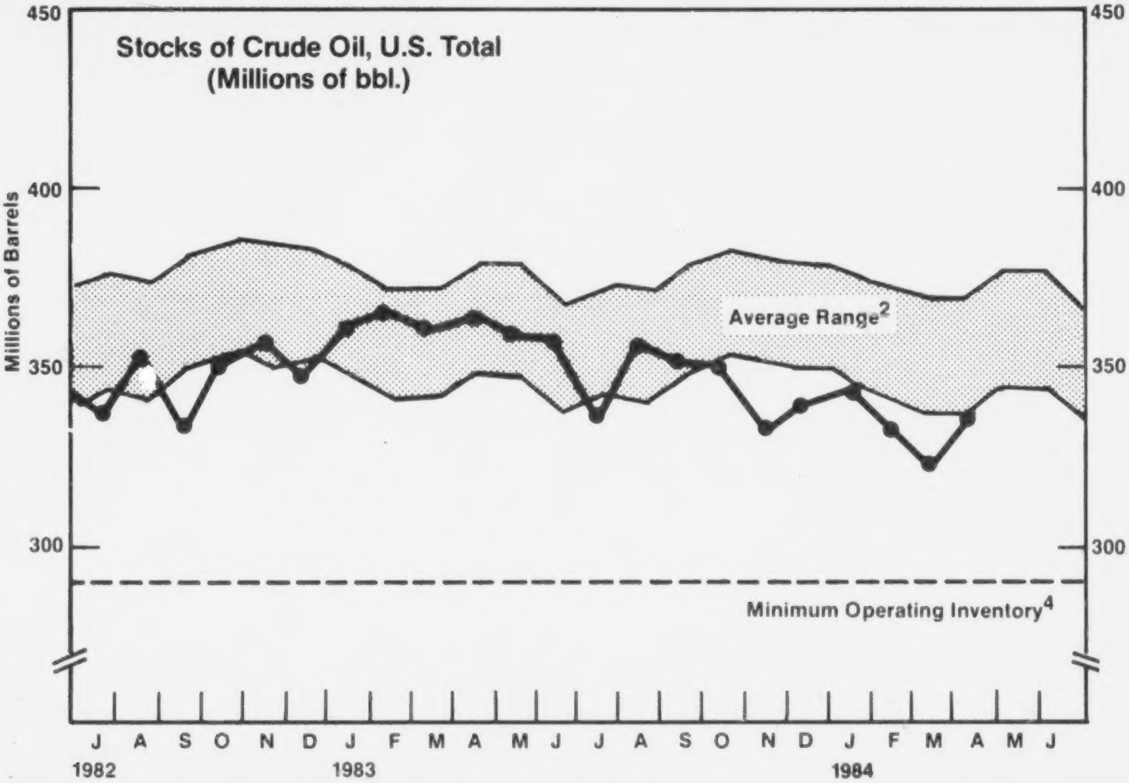
Stocks of Motor Gasoline, U.S. Total (Millions of bbl.)

Product stocks at the Primary Level include those held at refineries, in pipelines, and at major bulk terminals. They do not include stocks held in secondary distribution facilities such as jobber tanks, consumer tanks, and or barges designed for consumer markets. (1) The average level and width of average range are based on three years of monthly data for the period of July 1980, through June 1983. The seasonal pattern is based on six years of monthly data 1976 and 1978-82. (2) National Petroleum Council defines the Minimum Operating Inventory as the minimum level required for routine operation. By its definition, runouts and shortages could occur if inventory levels fall below that level for any extended period of time. NPC revised its minimum operating levels in late 1983.

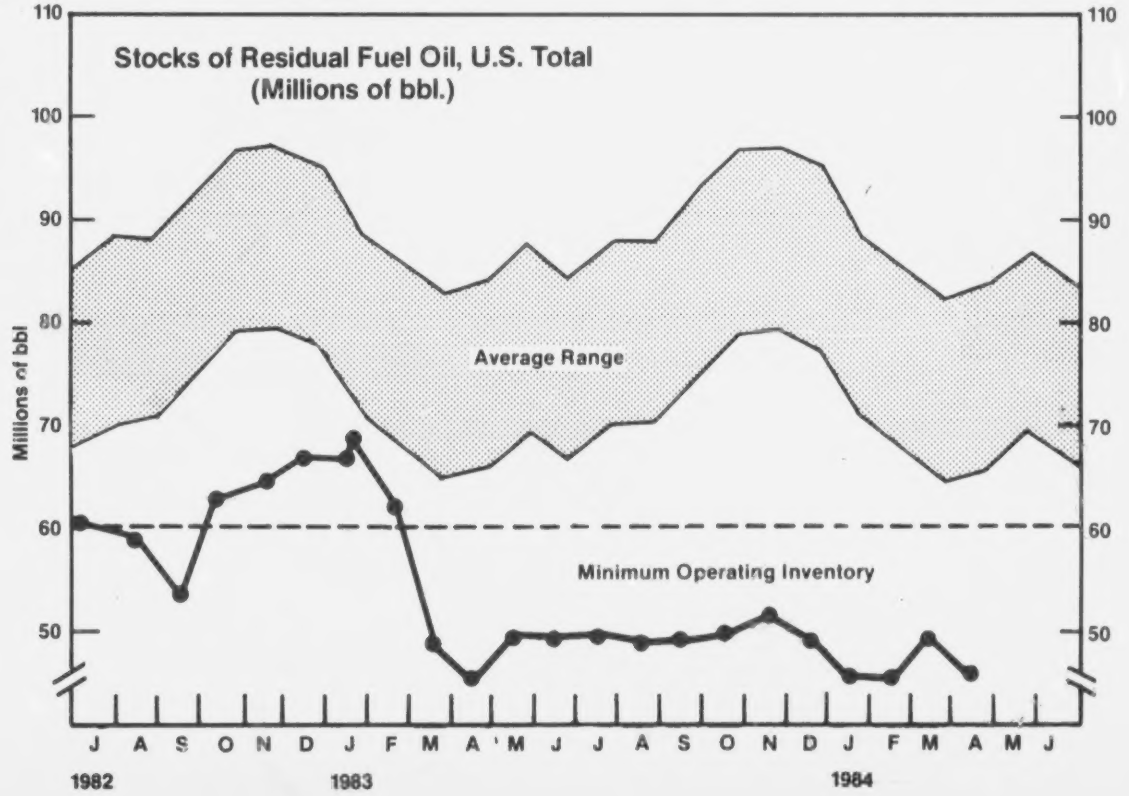
Source: Department of Energy, Weekly Statistical Reports, April 1984.



Stocks of Distillate Fuel Oil, U.S. Total (Millions of bbl.)



Crude Stocks at Primary Levels include those held at refineries, in pipelines, and in lease tanks, but do not include those held in the Strategic Petroleum Reserve operated by the U.S. Government. (1) The average level and width of average range are based on three years of monthly data for the period of July 1980 and June 1983. The seasonal pattern is based on six years of monthly data for the period of 1976 and 1978-82. (2) National Petroleum Council defines the Minimum Operating Inventory as the minimum level required for routine operation. By its definition, runouts and shortages could occur if inventory levels fall below that level for any extended period of time. NPC revised its minimum operating levels late in 1983.
Source: Department of Energy, Weekly Statistical Reports, April 1984.



Stocks of Motor Gasoline by PAD Regions

(Add 000,000 bbl.)

1983	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Fin. Gasoline	208.3	207.4	183.7	182.9	186.8	183.3	189.8	184.8	189.6	187.8	196.0	185.5
Blend. Comp.	42.6	43.8	40.3	37.9	37.8	39.9	40.8	41.6	40.0	40.5	39.9	36.9
Total Gasoline	250.9	251.1	224.0	220.8	224.6	223.2	230.6	226.4	229.6	228.3	235.9	222.4
East Coast	69.9	66.0	55.4	60.8	63.6	61.3	64.3	62.6	64.1	61.7	63.5	63.8
Midwest	75.3	77.2	68.3	65.4	64.6	63.7	64.6	64.8	65.7	65.3	68.4	63.7
Gulf Coast	65.0	66.6	66.3	62.7	64.0	64.7	65.1	62.3	65.0	68.0	70.0	60.1
Rocky Mountain	9.4	9.4	8.3	7.9	7.4	6.7	6.4	5.9	5.9	6.3	7.4	7.7
West Coast	31.3	31.9	25.8	24.1	25.0	26.9	30.2	30.8	29.0	27.1	26.6	27.0

Stocks of Distillate Fuel Oil by PAD Regions

(Add 000,000 bbl.)

1983	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Total U.S.	168.2	147.4	118.7	103.2	109.2	113.8	131.0	143.5	154.7	163.3	161.3	140.4
East Coast	71.1	55.3	38.1	31.8	37.2	41.1	50.9	61.9	67.5	74.6	70.8	57.8
Midwest	47.2	46.4	39.0	33.3	30.4	29.6	33.6	36.7	39.1	40.8	42.7	40.3
Gulf Coast	31.7	28.9	27.2	26.0	28.8	29.7	32.5	31.3	34.7	34.6	33.8	27.8
Rocky Mountain	4.1	4.0	3.3	2.8	2.9	2.8	3.0	3.0	2.7	2.6	2.8	3.3
West Coast	14.1	12.8	11.1	9.4	9.9	10.6	11.0	10.6	10.8	10.7	11.2	11.2

Stocks of Residual Fuel Oil by PAD Regions

(Add 000,000 bbl.)

1983	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Total U.S.	60.7	53.1	46.3	46.6	50.9	50.1	51.9	48.3	49.7	51.4	54.5	49.1
East Coast	29.9	25.1	20.6	20.3	23.8	24.0	25.3	23.8	23.5	25.3	29.3	25.0
Midwest	5.0	4.5	3.6	3.4	3.5	3.7	3.7	3.7	3.5	3.8	3.6	4.0
Gulf Coast	16.3	14.0	12.8	13.4	14.5	13.5	13.8	13.3	13.8	13.6	12.5	11.5
Rocky Mountain	0.5	0.4	0.4	0.5	0.5	0.4	0.5	0.5	0.5	0.5	0.5	0.5
West Coast	9.0	9.1	8.9	9.0	8.5	8.4	8.6	7.1	8.4	8.3	8.6	8.2

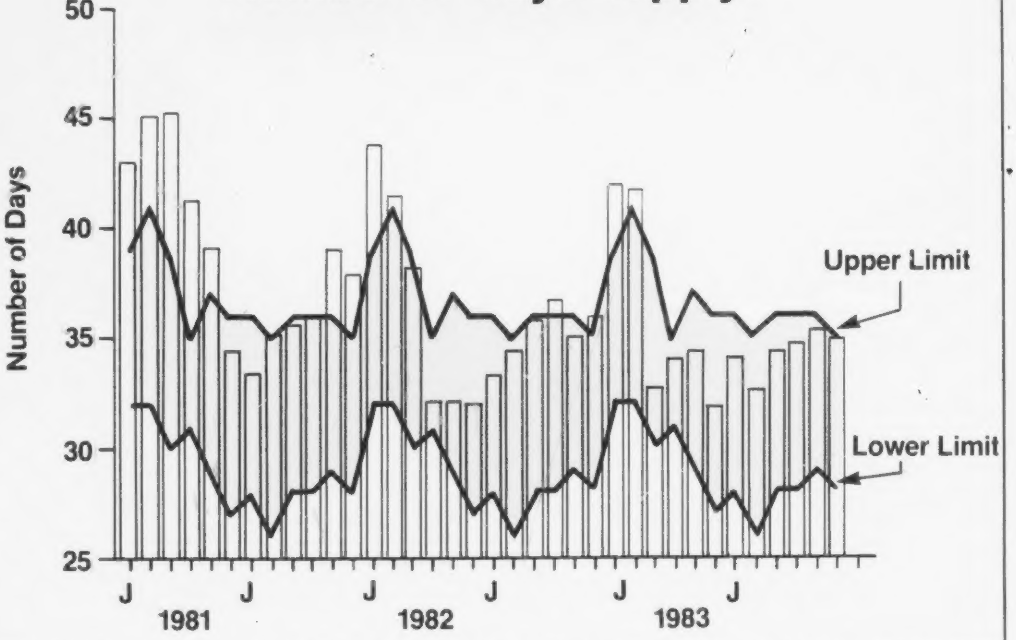
Petroleum Products Supplied

(Millions of b/d)

1983	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Motor Gasoline	6.0	6.0	6.8	6.5	6.5	7.0	6.8	6.9	6.7	6.6	6.6	6.8
Jet Fuel	0.9	1.0	1.0	1.1	1.0	1.1	1.0	1.1	1.1	1.0	1.0	1.2
Distillate Fuel Oil	2.8	2.8	2.9	2.7	2.3	2.5	2.2	2.5	2.6	2.6	2.9	3.4
Residual Fuel Oil	1.6	1.6	1.6	1.4	1.3	1.3	1.3	1.4	1.3	1.2	1.4	1.6
Other	3.5	3.3	3.2	3.1	3.1	3.4	3.6	3.5	3.7	3.5	3.7	3.7
Total	14.8	14.8	15.5	14.8	14.3	15.3	14.9	15.4	15.4	14.9	15.5	16.7
1982												
Motor Gasoline	6.0	6.2	6.5	6.9	6.7	6.8	6.8	6.6	6.5	6.4	6.6	6.5
Jet Fuel	1.0	1.1	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.1	1.1
Distillate Fuel Oil	3.5	3.1	2.9	3.0	2.4	2.5	2.1	2.2	2.5	2.6	2.5	2.9
Residual Fuel Oil	2.2	2.3	1.9	1.9	1.6	1.5	1.6	1.5	1.5	1.5	1.6	1.6
Other	3.5	3.3	3.3	3.2	3.2	3.2	3.4	3.5	3.5	3.4	3.3	3.4
Total	16.1	16.0	15.6	16.0	14.8	15.0	14.8	14.8	15.0	14.9	15.0	15.5

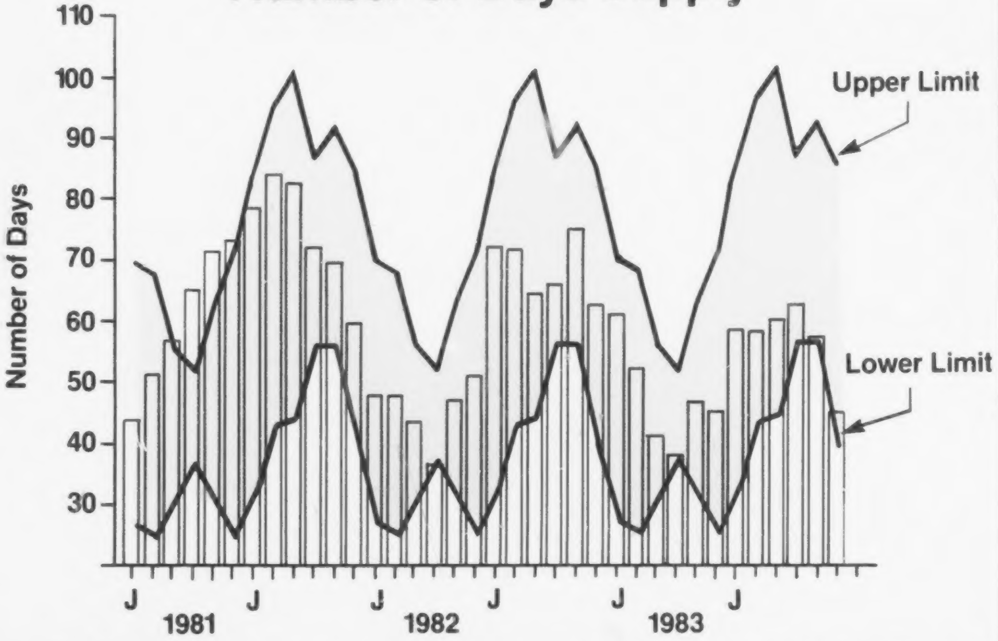
Source: Energy Information Administration, Weekly Petroleum Status Report

Gasoline Inventories Number of Days Supply



Sources: Dept. of Energy, American Petroleum Inst. Historical Range based on highest and lowest value between 1973 and 1980

Distillate Inventories Number of Days Supply



Sources: Dept. of Energy, American Petroleum Inst. Historical Range based on highest and lowest value between 1973 and 1980

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Petroleum Production and New Reserves Found

All Time to Dec. 31, 1982

	Total Liquid Petroleum			Natural Gas		
	(Mil. Bbl.)			(Bil. Cu. Ft.)		
	Found	Produced	Proved Reserves Dec. 31, 1982	Found	Produced	Proved Reserves Dec. 31, 1982
PAD District 1						
Florida	681	567	114	509	423	86
Maryland	0	0	0	†	†	†
New York	†	†	†	835	606	229
Pennsylvania	1,356	1,319	37	11,014	9,584	1,430
Virginia	†	†	†	†	†	†
West Virginia	908	781	127	17,876	15,624	2,252
Total	**2,945**	**2,667**	**278**	**30,234**	**26,237**	**3,997**
PAD District 2						
Illinois	3,316	3,166	150	†	†	†
Indiana	508	480	28	†	†	†
Kansas	6,436	5,756	680	37,701	27,573	10,128
Kentucky	848	777	71	4,178	3,586	592
Michigan	1,264	983	281	1,815	615	1,200
Missouri	†	†	†	†	†	†
Nebraska	439	407	32	†	†	†
North Dakota	1,059	751	309	1,707	1,011	696
Ohio	1,007	896	111	7,066	5,924	1,142
Oklahoma	16,495	14,779	1,716	73,067	55,927	17,140
South Dakota	†	†	†	†	†	†
Tennessee	†	†	†	†	†	†
Total	**31,372**	**27,995**	**3,377**	**125,534**	**94,636**	**30,898**
PAD District 3						
Alabama	573	326	247	1,186	490	696
Arkansas	1,733	1,611	122	5,866	3,892	1,974
Louisiana	27,416	23,393	4,023	217,710	171,811	45,899
Mississippi	2,333	2,092	241	7,820	6,017	1,803
New Mexico	7,112	6,019	1,093	47,552	34,470	13,082
Texas	75,341	64,955	10,386	297,039	243,908	53,131
Total	**114,509**	**98,396**	**16,113**	**577,173**	**460,588**	**116,585**
PAD District 4						
Colorado	1,845	1,490	355	7,454	3,903	3,551
Montana	1,370	1,136	234	2,810	1,940	870
Utah	1,283	818	465	3,866	1,613	2,253
Wyoming	6,454	5,209	1,245	20,113	9,958	10,155
Total	**10,952**	**8,653**	**2,299**	**34,243**	**17,414**	**16,829**
PAD District 5						
Alaska	11,108	3,693	7,415	37,631	2,629	35,002
Arizona	†	†	†	†	†	†
California	26,289	20,730	5,559	35,353	29,606	5,747
Nevada	†	†	†	†	†	†
Oregon	0	0	0	†	†	†
Total	**37,397**	**24,423**	**12,974**	**72,984**	**32,235**	**40,749**
All Other States	312	275	37	2,376	2,180	196
Total U.S.	**197,487**	**162,409**	**35,078**	**842,544**	**633,290**	**209,254**

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†Included in All Other States.

Source: Independent Petroleum Assn. of America, "The Oil Industry in Your State, 1983."

U.S. Crude Oil Production—1982-1973

(Thousands of b/d)

	1982	1981	1980	1979	1978	1977	1976	1975	1974	1973
PAD District 1										
Florida	70.2	95.3	117.2	129.2	130.2	127.8	121.5	114.7	99.6	89.6
New York	2.3	2.3	2.3	2.3	2.3	2.3	2.3	2.4	2.5	2.6
Pennsylvania	11.7	10.2	7.2	7.9	7.9	7.4	8.3	9.0	9.5	9.0
Virginia	0.1	**	**	**	**	**	**	**	**	**
West Virginia	8.9	9.5	6.4	6.6	6.5	6.9	6.9	6.8	7.3	6.5
Total	**93.2**	**117.3**	**133.1**	**146.0**	**146.9**	**144.4**	**139.0**	**132.9**	**118.9**	**107.7**
PAD District 2										
Illinois	75.9	66.0	62.0	59.7	64.0	70.2	71.8	71.4	75.5	84.0
Indiana	15.2	12.9	13.6	12.9	12.8	14.6	12.7	12.7	13.5	14.6
Kansas	193.2	180.3	164.3	156.2	155.0	157.5	160.4	161.9	169.0	181.5
Kentucky	20.2	17.9	16.2	15.1	15.7	18.0	20.4	20.7	21.5	23.8
Michigan	86.2	89.5	97.8	95.5	95.0	90.3	83.1	66.9	49.4	40.0
Nebraska	18.8	18.3	17.0	16.6	16.1	16.4	16.9	16.8	18.1	19.8
North Dakota	129.5	124.4	110.2	84.7	68.0	63.8	59.4	56.0	54.0	55.4
Ohio	39.9	37.1	35.3	32.8	30.6	28.4	27.3	26.2	24.9	24.1
Oklahoma	434.6	422.1	410.2	393.6	412.2	428.4	441.0	446.9	487.1	523.8
South Dakota	3.2	2.7	2.1	2.3	2.4	1.7	1.2	1.3	1.3	0.8
Other[1]	3.7	3.2	2.4	1.9	1.8	2.4	1.8	2.0	2.2	0.8
Total	**1,020.4**	**974.4**	**931.1**	**871.3**	**873.6**	**891.7**	**896.0**	**882.8**	**916.5**	**968.6**
PAD District 3										
Alabama	54.8	56.6	60.5	52.5	54.3	50.0	40.2	36.9	36.5	32.0
Arkansas	51.6	50.3	49.8	51.7	55.7	55.3	49.5	44.2	45.3	49.4
Louisiana	1,255.9	1,231.0	1,281.8	1,341.6	1,459.6	1,542.2	1,657.1	1,783.1	2,020.0	2,278.1
Gulf	1,159.3	1,135.2	1,193.2	1,254.1	1,363.1	1,441.1	1,552.7	1,680.8	1,913.7	2,169.2
Other	96.6	95.8	88.6	87.5	96.5	101.1	104.4	102.3	106.3	108.9
Mississippi	90.5	93.7	98.2	102.3	115.1	117.9	125.9	127.7	139.1	153.7
New Mexico	194.6	196.1	205.1	218.2	228.4	239.0	251.7	260.5	270.4	276.7
Texas	2,535.1	2,589.4	2,670.6	2,789.3	2,942.6	3,117.5	3,250.0	3,347.8	3,457.9	3,547.0
Total	**4,182.5**	**4,217.1**	**4,366.0**	**4,555.6**	**4,855.7**	**5,121.9**	**5,374.4**	**5,600.2**	**6,969.2**	**6,336.9**
PAD District 4										
Colorado	83.7	83.0	81.4	88.5	100.8	108.1	106.5	104.4	102.8	100.2
Montana	84.7	84.4	80.0	82.1	83.5	89.5	89.7	90.0	94.7	94.8
Utah	61.5	70.9	68.2	76.0	85.9	90.7	93.7	115.9	107.8	89.5
Wyoming	324.1	357.7	345.2	361.3	376.4	373.9	366.5	372.5	383.5	388.8
Total	**554.0**	**596.0**	**574.8**	**607.9**	**646.6**	**662.2**	**656.4**	**682.8**	**688.8**	**673.3**
PAD District 5										
Alaska	1,695.6	1,609.1	1,616.6	1,400.9	1,229.1	463.6	173.2	191.3	193.4	198.1
Arizona	0.9	1.0	1.1	1.3	1.1	1.2	1.4	1.7	2.0	2.2
California	1,100.2	1,054.7	975.2	965.1	951.2	957.8	890.8	882.7	885.0	920.8
Nevada	1.7	1.9	2.4	3.4	3.2	1.8	0.4	0.3	0.4	0.3
Total	**2,798.4**	**2,666.7**	**2,595.3**	**2,370.7**	**2,184.6**	**1,424.4**	**1,065.8**	**1,076.0**	**1,080.8**	**1,121.4**
Total U.S.	**8.648.5**	**8,571.5**	**8,600.3**	**8,551.5**	**8,707.4**	**8,244.6**	**8,131.6**	**8,374.7**	**8,774.2**	**9,207.9**

**Less than 100 barrels per day.

[1] Missouri and Tennessee.

Source: Independent Petroleum Assn. of America, "The Oil Industry in Your State, 1983."

U.S. Estimated Petroleum Balance—1983 (Add 000 bbl.)

Supply/Products Supplied From Primary Storage (a)	Full Year 1983	Full Year 1982	Full Year % Chng.	4th Quarter 1983	4th Quarter 1982	4th Quarter % Chng.	3rd Quarter 1983	3rd Quarter 1982	3rd Quarter % Chng.	2nd Quarter 1983	2nd Quarter 1982	2nd Quarter % Chng.
Products Supplied:												
Motor Gasoline, total	6,606	6,539	1.0%	6,639	6,504	2.1%	6,800	6,646	2.3%	6,687	6,783	(1.4%)
Finished leaded gasoline	2,970	3,130	(5.1)	2,884	3,075	(6.2)	3,028	3,146	(3.8)	3,044	3,293	(7.6)
Finished unleaded gasoline	3,636	3,409	6.7	3,755	3,429	9.5	3,722	3,500	7.8	3,643	3,490	4.4
Naphtha-jet	208	209	(0.5)	199	205	(2.9)	193	213	(9.4)	227	219	3.7
Kerosine-jet	837	804	4.1	870	818	6.4	860	792	8.6	831	780	6.5
Distillate fuel oil	2,681	2,661	0.8	2,944	2,631	11.9	2,367	2,247	5.3	2,511	2,617	(4.1)
Residual fuel Oil	1,377	1,668	(17.4)	1,279	1,517	(15.7)	1,313	1,421	(10.7)	1,312	1,588	(17.4)
All other oils	3,598	3,680	(2.2)	3,788	3,686	2.8	3,676	3,800	(3.3)	3,376	3,629	(7.0)
Reclassified	−173	−262	(34.0)	−195	−240	(18.8)	−125	−273	(54.2)	−149	−342	(56.4)
Total domestic products supplied	15,134	15,299	(1.1)	15,524	15,121	2.7	15,084	14,896	1.3	14,795	15,274	(3.1)
Exports	737	815	(9.6)	621	860	(27.8)	715	796	(10.2)	752	764	(1.6)
Total products supplied	**15,871**	**16,114**	**(1.5)**	**16,145**	**15,981**	**1.0**	**15,799**	**15,692**	**0.7**	**15,547**	**16,038**	**(3.1)**
Supply:												
Domestic production												
Crude oil	8,655	8,649	0.1	8,636	8,665	(0.3)	8,658	8,664	(0.1)	8,682	8,651	0.4
Natural gas liquids	1,567	1,550	1.1	1,604	1,589	0.9	1,516	1,519	(0.2)	1,536	1,537	(0.1)
Other supply	718	645	11.3	660	687	(3.9)	504	576	(12.5)	694	654	6.1
Total domestic supply	10,940	10,844	0.9	10,990	10,941	(0.4)	10,678	10,759	(0.8)	10,912	10,842	0.6
Imports:												
Crude oil, total	3,083	3,323	(7.2)	3,192	3,334	4.3	3,899	3,766	3.5	3,046	3,137	(2.9)
Canadian	270	214	26.2	276	235	17.4	297	245	21.2	243	189	28.6
Other	2,813	3,109	(9.5)	2,916	3,099	(5.9)	3,602	3,521	2.3	2,803	2,948	(4.9)
Products, total	1,671	1,625	2.8	1,752	1,706	2.7	1,858	1,602	16.0	1,571	1,463	7.4
Residual fuel oil	685	776	(11.7)	667	788	(15.4)	707	691	2.3	639	715	(10.6)
Other	986	849	16.1	1,085	918	18.2	1,151	911	26.3	932	748	24.6
Total imports	4,754	4,948	(3.9)	4,944	5,040	(1.9)	5,755	5,368	7.2	4,617	4,600	0.4
Total supply	**15,694**	**15,792**	**(0.6)**	**15,844**	**15,981**	**(0.9)**	**16,435**	**16,127**	**1.9**	**15,529**	**15,442**	**0.6**

(a) Preliminary for 1983.
Source: American Petroleum Institute, Monthly Statistical Reports.

U.S. Refinery Operations (Add 000 b/d)

Refinery Operations (a)	Full Year 1983	Full Year 1982	Full Year % Chng.	4th Quarter 1983	4th Quarter 1982	4th Quarter % Chng.	3rd Quarter 1983	3rd Quarter 1982	3rd Quarter % Chng.	2nd Quarter 1983	2nd Quarter 1982	2nd Quarter % Chng.
Import to crude oil distillation units	11,914	12,171	(2.1%)	11,474	11,898	(3.6%)	12,856	12,558	2.4%	12,018	12,310	(2.4%)
Operable capacity	16,644	17,432	(4.5)	16,309	17,076	(4.5)	16,294	17,001	(4.2)	16,847	17,843	(5.6)
Refinery utilization (%)	71.6%	69.8%	2.6	70.4%	69.7%	1.0	78.9%	73.9%	6.8	71.3%	69.0%	3.3
Crude oil runs	11,675	11,744	(0.8)	11,264	11,514	(2.2)	12,552	12,146	3.3	11,692	11,894	(1.7)

(a) Preliminary for 1983 data.
Source: American Petroleum Institute, Monthly Statistical Reports.

Crude and Product Inventories (Add 000,000 bbl.)

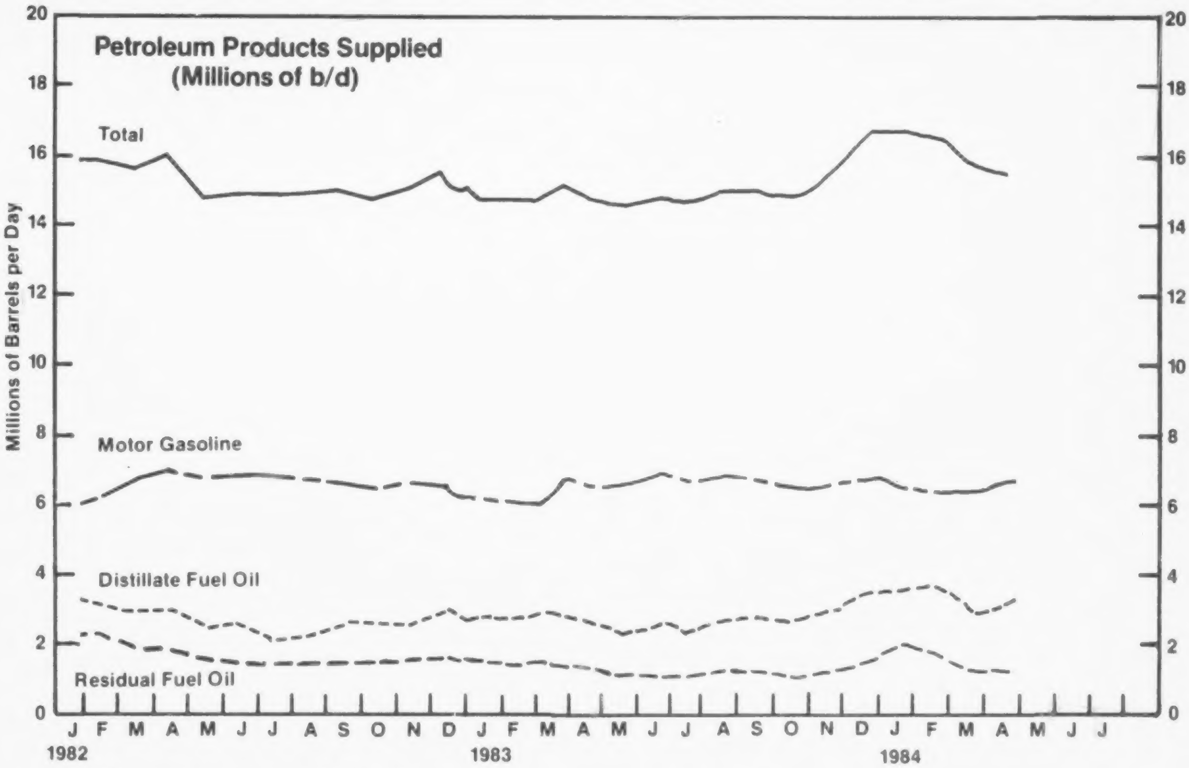
Stocks (a)	Full Year 1983	Full Year 1982	Full Year % Chng.	4th Quarter 1983	4th Quarter 1982	4th Quarter % Chng.	3rd Quarter 1983	3rd Quarter 1982	3rd Quarter % Chng.	2nd Quarter 1983	2nd Quarter 1982	2nd Quarter % Chng.
Crude oil (b)	348.0	350.0	(0.3%)	348.0	350.0	(0.3%)	347.8	340.7	2.1%	350.8	342.8	2.3%
Unfinished oils	104.9	105.3	(0.4)	104.9	105.3	(0.4)	114.0	117.8	(3.2)	108.2	117.5	(7.9)
Total motor gasoline	229.7	244.3	(6.0)	229.7	244.3	(6.0)	230.7	233.6	(1.2)	224.1	219.8	2.0
Finished leaded motor gasoline	96.0	102.2	(6.1)	96.0	102.2	(6.1)	97.4	93.5	4.2	94.6	90.4	4.6
Finished unleaded motor gasoline	94.6	100.4	(5.8)	94.6	100.4	(5.8)	93.6	97.6	(4.1)	88.7	87.5	1.4
Naphtha-jet	6.9	7.2	(4.2)	6.9	7.2	(4.2)	6.6	6.3	4.8	7.5	6.1	23.0
Kerosine-jet	33.3	32.0	4.1	33.3	32.0	4.1	34.4	33.3	3.3	35.7	34.0	5.0
Distillate fuel oil	146.5	185.6	(21.1)	146.5	185.6	(21.1)	154.4	161.2	(4.2)	114.3	124.6	(8.3)
Residual fuel oil	49.9	68.2	(26.8)	49.9	68.2	(26.8)	46.9	61.8	(24.1)	47.1	60.5	(22.1)
All other oils	183.5	175.6	4.5	183.5	175.6	4.5	200.5	181.4	10.5	174.3	192.8	(9.5)
Total all oils	**1,103.5**	**1,168.2**	**(5.5)**	**1,103.5**	**1,168.2**	**5.5**	**1,135.3**	**1,136.1**	**(0.1)**	**1,062.0**	**1,098.1**	**(3.3)**

(a) Preliminary for 1983; (b) Does not include oil imported for Strategic Petroleum Reserve, nor crude stocks held in the SPR.
Source: American Petroleum Institute, Monthly Statistical Reports.

Domestic Supply Trend (Add 000,000 bbl.)

Year	All products	Gasoline	Kerosine (a)	Distillate	Residual	LPG	Lubes	Other
1983 (b)	5,020	2,415	352	979	512	538	52	172
1982	5,568	2,386	339	977	618	443	51	754
1981	5,861	2,404	342	1,032	762	407	56	858
1980	6,932	2,536	397	1,389	1,033	414	58	1,105
1979	6,758	2,568	388	1,210	1,032	456	66	1,038
1978	6,879	2,705	377	1,253	1,103	358	63	1,020
1977	6,710	2,633	350	1,223	1,121	369	58	956
1976	6,391	2,567	351	1,147	1,025	381	56	864
1975	5,958	2,436	347	1,041	899	362	50	823
1973	6,317	2,453	386	1,124	1,030	404	59	851
1971	5,552	2,213	385	971	838	369	49	727
1970	5,364	2,131	358	927	804	363	50	731
1965	4,202	1,720	220	776	587	307	47	545
1960	3,610	1,512	132	685	559	227	43	427

(a) Kerosine includes jet fuel; (b) Preliminary.
Source: Petroleum Supply Monthly, Energy Information Administration.



Source: Department of Energy, Weekly Petroleum Status Report

Role of Imports in Domestic Demand

Year	U.S. Imports Total (a) (Add 000)	b/d Avg.	% Change	Domestic Demand for Refined Products Total (Add 000)	b/d Avg.	% Change	Imports as % of U.S. Demand
1983 (b)	1,820,620	4,988	−2.5%	5,542,160	15,184	−0.7%	32.9%
1982	1,866,358	5,113	−10.9	5,582,938	15,295	−4.7	33.4
1981	2,095,122	5,740	−16.4	5,861,058	16,058	−5.9	35.7
1980	2,512,636	6,865	−18.2	6,242,445	17,056	−7.9	40.3
1979	3,062,053	8,389	+2.3	6,757,077	18,513	−1.8	45.3
1978	2,993,847	8,202	−6.7	6,879,017	18,847	+2.3	43.5
1977	3,207,106	8,787	+20.2	6,727,468	18,431	+5.6	47.7
1976	2,676,411	7,313	+20.8	6,390,750	17,461	+7.2	41.9
1975	2,210,335	6,056	−0.9	5,957,515	16,322	−2.0	37.1
1974	2,230,947	6,112	−2.3	6,078,239	16,653	−3.8	36.7
1973	2,283,493	6,256	+32.0	6,317,303	17,308	+5.7	36.1
1972	1,735,314	4,741	+20.8	5,990,316	16,367	+7.6	29.0
1971	1,432,880	3,926	+14.8	5,552,560	15,212	+3.5	25.8
1970	1,248,062	3,419	+8.0	5,364,473	14,697	+4.0	23.3
1965	900,772	2,468	+9.3	4,202,039	11,512	+4.4	21.4
1960	664,111	1,815	+2.0	3,585,820	9,797	+2.8	18.5
1955	455,564	1,248	+18.6	3,089,348	8,464	+9.0	14.7
1950	310,261	850	+31.8	2,392,974	6,556	+13.0	13.0

(a) Crude oil and products but not crude for Strategic Petroleum Reserve; (b) Preliminary.
Source: American Petroleum Institute, Basic Petroleum Data Book, Department of Energy

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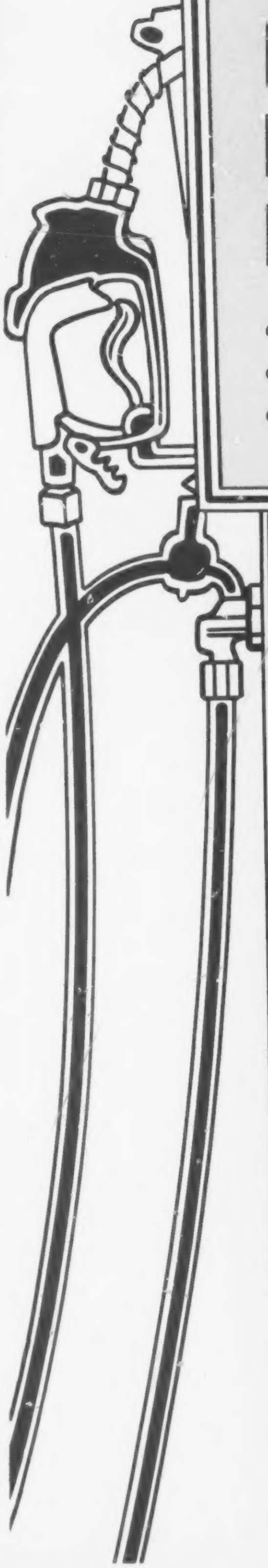

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Petroleum Product Consumption—1982

(Add 000 bbl.)

	Motor Gasoline	Aviation Fuels[1]	Middle Distillates[2]	Residual Fuel Oil	L.P.G.	Asphalt Road Oil	All Other	Total
Alabama	43,819	867	17,166	6,350	3,742	4,490	9,322	86,756
Alaska	5,598	8,886	7,597	301	180	461	2,827	25,850
Arizona	31,943	3,635	8,120	297	1,400	1,907	5,773	53,075
Arkansas	26,749	686	13,845	1,803	3,452	2,399	5,954	54,888
California	253,822	38,869	67,871	81,392	13,761	12,300	51,058	519,073
Colorado	36,029	4,658	9,394	14	3,906	2,030	6,856	62,887
Connecticut	30,594	898	20,890	21,349	1,199	984	9,261	85,175
Delaware	6,725	75	3,093	6,289	748	554	2,165	19,649
Florida	116,671	24,243	23,529	63,079	7,516	6,273	23,394	264,705
Georgia	67,104	11,617	18,700	5,562	5,385	4,920	13,832	127,120
Hawaii	8,312	4,526	4,570	13,323	1,779	215	3,969	36,694
Idaho	10,876	367	4,527	223	871	677	2,165	19,706
Illinois	107,675	13,845	32,960	15,507	22,729	6,089	18,222	217,027
Indiana	57,890	3,209	29,504	4,856	5,775	6,765	13,170	121,169
Iowa	33,829	552	16,662	321	10,110	2,399	7,818	71,691
Kansas	29,433	1,189	14,043	993	10,105	2,368	7,096	65,227
Kentucky	40,991	2,919	18,647	1,197	6,016	3,629	8,961	82,360
Louisiana	51,074	5,549	36,608	48,260	74,821	3,721	26,822	246,855
Maine	12,039	414	9,505	15,803	708	584	4,751	43,804
Maryland	44,973	2,019	17,003	11,898	1,729	3,936	9,923	91,481
Massachusetts	53,238	6,172	33,031	42,762	1,825	1,907	16,959	155,894
Michigan	90,480	3,574	23,562	4,285	6,011	3,260	15,997	147,169
Minnesota	45,981	3,595	21,111	1,732	6,337	4,859	10,224	93,839
Mississippi	27,426	1,911	12,179	5,570	3,790	2,153	6,495	59,524
Missouri	59,402	3,698	21,518	856	7,566	4,121	11,847	109,008
Montana	10,771	513	5,814	1,668	1,223	1,107	2,586	23,682
Nebraska	18,871	576	9,269	198	4,050	923	4,150	38,037
Nevada	11,673	4,061	3,536	119	826	830	2,586	23,631
New Hampshire	9,364	62	5,332	4,106	1,115	461	2,526	22,966
New Jersey	75,536	27,756	46,952	34,241	5,292	6,058	23,875	219,710
New Mexico	17,729	762	8,539	716	2,301	1,814	32,836	64,697
New York	133,747	3,215	65,169	97,868	4,125	6,765	31,873	342,762
North Carolina	67,890	2,944	22,516	5,971	5,872	2,768	13,169	121,130
North Dakota	9,597	225	7,235	1,171	1,223	953	2,406	22,810
Ohio	108,598	4,468	42,813	2,488	34,503	9,225	24,657	226,752
Oklahoma	45,934	3,239	15,018	700	6,828	4,305	9,261	85,285
Oregon	28,836	1,535	15,116	10,927	1,118	2,091	7,277	66,900
Pennsylvania	104,384	7,177	55,997	20,789	6,064	6,765	18,402	219,578
Rhode Island	8,591	227	4,109	1,791	277	1,507	1,985	18,487
South Carolina	36,091	489	10,067	2,965	2,205	1,507	6,495	59,819
South Dakota	9,358	217	5,168	51	1,887	800	2,105	19,586
Tennessee	56,081	1,822	19,863	748	1,944	5,228	10,464	96,150
Texas	195,278	31,784	100,307	62,069	165,188	9,840	62,844	627,310
Utah	17,477	1,644	6,617	886	1,288	1,169	3,548	32,629
Vermont	5,641	47	2,894	372	729	92	1,143	10,918
Virginia	59,372	6,889	23,211	9,591	2,502	2,522	12,689	116,776
Washington	44,075	9,183	18,392	14,029	1,443	2,245	10,885	100,252
West Virginia	19,306	240	8,102	1,443	2,270	830	3,909	36,100
Wisconsin	47,192	1,712	20,779	2,212	5,002	2,645	9,682	89,224
Wyoming	8,558	215	11,154	1,634	2,157	1,138	3,007	27,863
District of Columbia	4,060	287	2,221	1,527	(3)	(3)	2,165	10,260
TOTAL U.S.	2,44[illegible]53	259,262	1,021,825	634,302	462,893	156,589	601,386	5,582,940

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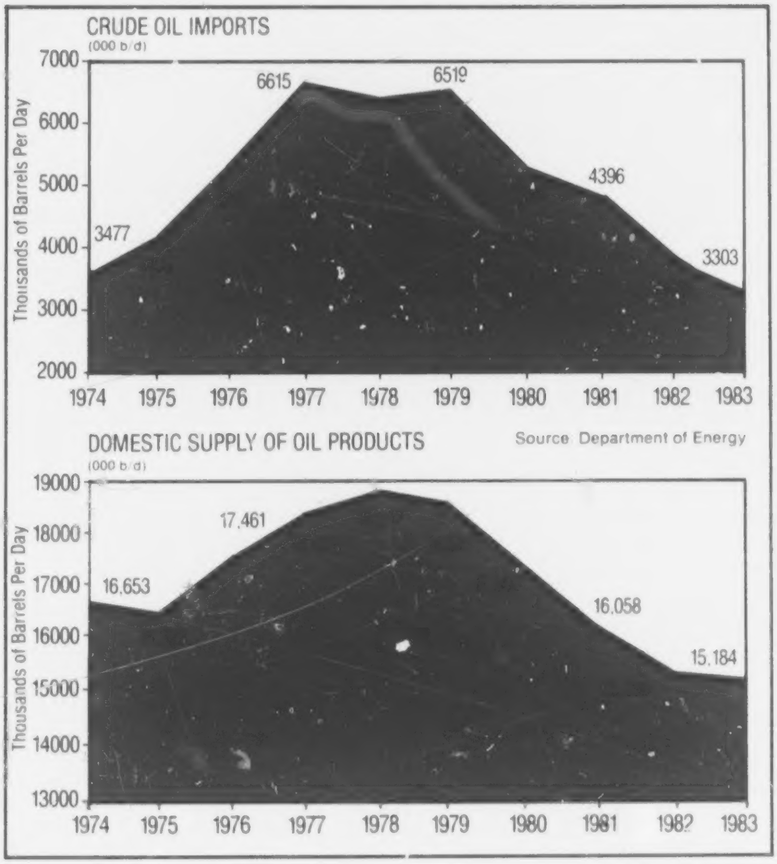
[1] Does not include aviation fuel for military use

[2] Includes Kerosine

(3)Dist. of Columbia included in Maryland

Source: Independent Petroleum Assn. of America, "The Oil Industry in Your State 1983"



Source: Department of Energy

The consumption declines of recent years appear to have bottomed out in 1983. At least, there were modest upturns in demand for gasoline, distillate oils, avgas, jet fuel, lubes and asphalt—everything but residual fuel oil.

The increases were not truly significant, however—1% in the case of gasoline, for example. But they were, nevertheless, plus instead of minus signs. The rise in distillate consumption meant little to fuel oil dealers. Most of the increase was in diesel fuel for highway transportation, not residential furnaces.

Price competition was as fierce as ever. At the end of the year, the leaded regular average was $1.157/gal., down almost 7¢ from the preceding year; unleaded regular was $1.241 gal., compared with $1.296 for 1982; and unleaded premium was $1.372, versus 1982's $1.417. The average for all types was $1.225, compared with $1.281 in 1982.

A note of good cheer was another decrease in U.S. reliance on foreign oil. Imports of crude and products declined to 4.8-million b/d from 4.9-million b/d in 1982.

This was only a one-tenth of a percent decrease in U.S. reliance on imports—30.1% in 1982 to 30.0% in 1983, and forecasters continue to say that imports are going to rise again and that by the year 2000 the U.S. will be bringing in almost half of the oil it needs.

Supply and Production, Principal Products

(Add 000 bbl.)

	Motor Gasoline	Aviation Gasoline	Distillate Fuel Oil	Residual Fuel Oil	Jet Fuel (a)	Lubricants	Asphalt
Domestic Supply							
1983	2,415,377	9,375	978,958	512,175	380,369	51,924	136,234
1982	2,386,286	9,322	976,822	618,351	369,283	50,882	124,545
Production							
1983	2,310,413	7,981	895,521	308,945	372,284	53,561	135,626
1982	2,315,626	8,176	953,420	388,614	356,513	51,563	121,556
Imports							
1983	90,901	214	61,645	251,609	9,629	2,995	2,420
1982	67,604	0	33,821	276,680	9,629	3,557	1,678

U.S. Oil Imports (a)

(Add 000 b/d)

Year	Crude Oil	Other Products	Residual Fuel Oil	Total Imports	% of Total U.S. Supply
1983 (b)	3,083	986	685	4,754	30.3%
1982	3,323	849	776	4,948	31.3
1981	4,141	779	800	5,720	33.9

(a) Does not include Strategic Petroleum Reserve. (b) Preliminary
Source: Department of Energy, Monthly Energy Review and IPAA

Origins of U.S. Oil Imports

(Add 000 b/d)

	Western Hemisphere			Eastern Hemisphere		
Year	Canada	Venezuela	Other	Mid-East	Africa	Other
1983	542	414	1,599	413	529	1,472
1982	465	385	1,925	790	705	605
1981	410	375	1,375	1,120	1,425	1,020

Source: Independent Petroleum Assn. of America and Monthly Energy Review

	Total Well Completions			Proved Reserves				Supply (Add 000 b/d)	
Year	Total (a)	Dry	% Dry	Crude Oil (b)	Crude Production Reserve Ratio	Natural Gas (c)	Natural Gas Production Reserve Ratio	Domestic Crude & Natl. Gas Lqds.	Crude & Product Imports
1983 (d)	78,515	23,518	30.0%	NA	NA	NA	NA	10,222	4,754
1982	88,106	26,549	30.1	27,858	9.4	201.5	11.5	10,199	4,948
1981	80,537	22,973	28.5	29,426	10.0	201.7	10.4	10,180	5,720

(a) Includes oil, gas, service and dry completions. (b) Millions of bbl. (c) Trillions of cubic feet. (d) Preliminary. Source: Independent Petroleum Assn. of America and Department of Energy

Supply/Demand Forecast for 1984

At its meeting in early May, the Independent Petroleum Assn. of America, whose semiannual forecasts are usually well on target, predicted that things in 1984 are going to be different and better than they were in 1983.

This is what IPAA saw in its crystal ball:

Domestic demand will increase more than 2% to reach a total of 15.62-million b/d by the end of the year—the first increase in product demand since 1978. Demand for motor fuel is expected to increase slightly, as it will for aviation fuel, middle distillates, and, after a slump in recent years, residual fuel oil.

Total supply in 1984 will be up slightly—about 3.9%—due mostly to increased imports. While domestic production is forecast to remain at its current level, IPAA says total imports will reach 5,367,000 b/d, a 12.87% jump up from 1983's level.

Inventories of crude and finished products are expected to increase a little bit in 1984. Last year, contrary to what many observers (including IPAA) thought would happen, there was a substantial stock withdrawal.

Crude runs will increase to 12.1-million b/d, up from 11.7-million b/d in 1983. Refinery capacity utilization will improve but not approach levels reached in the past.

Going into more detail, the IPAA forecast also said:

"Domestic product demand is expected to reverse its 5-year slide and go up 436,000 b/d in 1984.

"Motor gasoline demand is forecast to increase a slight 17,000 b/d in 1984, averaging 6.63-million b/d. Consumption is expected to improve due to the impact of higher employment and increased personal income, both of which are partially offset by increased fuel efficiency.

Aviation fuel consumption is expected to increase 5.3% in 1984, averaging 1.12-million b/d. Most of this increase can be attributed to an increase in the number of domestic flights.

Middle distillate demand is forecast to increase 4.0% this year to average 2.92-million b/d. The increase is primarily due to significantly colder weather so far in 1984 and greater industrial activity.

Residual fuel oil consumption is projected to rise 73,000 b/d (a 5.2% boost) to average 1.48-million b/d in 1984. Increased consumption in the industrial and utility sectors will strongly contribute to this gain.

Demand for liquefied gases are expected to increase 2.9% in 1984 to average 1.51-million b/d.

(Add 000 b/d except stocks which are millions of bbl.)

	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Full Year
Domestic Product Demand:					
Motor Gasoline	6.287	6,778	6.825	6.638	6,633
Aviation Fuels	1.153	1,105	1,128	1,112	1,124
Middle Distillates	3.352	2,693	2.561	3,084	2,921
Residual Fuel Oil	1.695	1,366	1,382	1,466	1,476
Liquefied Gases	1.731	1,269	1,361	1,699	1,514
Other Products	1.674	2,015	2,188	1,920	1,951
Total	**15,892**	**15,226**	**15,445**	**15,919**	**15,619**
Exports	581	667	646	664	641
Total Demand	**16,473**	**15,893**	**16,091**	**16,583**	**16,260**
Stock Changes	**−392**	**224**	**408**	**−177**	**16**
Total Supply					
Domestic Production:					
Crude Oil	8.680	8.683	8.647	8.632	8,660
Natural Gas Liquids	1.604	1,522	1,544	1.581	1,563
Total production	**10,284**	**10,205**	**10,191**	**10,213**	**10,223**
Imports:					
Crude Oil**	3.050	3,565	3.900	3.701	3,557
Motor Gasoline	291	250	255	232	257
Aviation Fuels	68	31	36	37	43
Middle Distillates	301	159	190	206	214
Residual Fuel Oil	920	681	708	750	764
Liquefied Gases	232	171	186	244	208
Other Products	369	320	307	302	324
Total Imports	**5,231**	**5,177**	**5,582**	**5,472**	**5,367**
Other Supply***	566	735	726	721	686
Total Supply	**16,081**	**16,117**	**16,499**	**16,406**	**16,276**
Closing Stocks: (Million Barrels)					
Motor Gasoline	242.4	232.5	228.0	229.5	229.5
Aviation Fuels	41.9	41.7	42.1	41.7	41.7
Middle Distillates	117.2	123.3	156.2	155.2	155.2
Residual Fuel Oil	48.9	49.5	48.8	47.9	47.9
Liquefied Gases	83.4	105.4	118.1	105.7	105.7
Other Products	50.3	49.6	44.3	46.0	46.0
Total Products	**584.1**	**602.0**	**637.5**	**626.0**	**626.0**
Unfinished Oils	113.4	111.2	111.8	108.6	108.6
Natural Gas Liquids	8.5	8.5	8.5	8.5	8.5
Crude Oil**	332.4	337.1	338.5	336.9	336.9
Total Inventories	**1,038.4**	**1,058.8**	**1,096.3**	**1,080.0**	**1,080.0**
Crude Runs to Stills	**11,602**	**12,158**	**12,460**	**12,272**	**12,124**

**Excludes Strategic Petroleum Reserve imports and stocks

***Processing gain, unaccounted crude and other hydrocarbons

Source: Independent Petroleum Assn. of America, Supply and Demand Committee, May 1984

U.S. Supply/Demand Projections—1983-2000

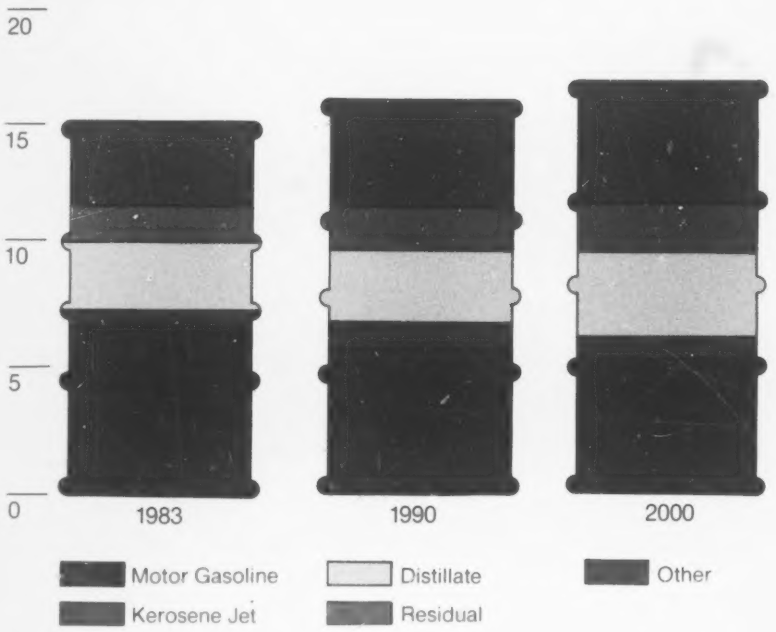
This is what's ahead for the U.S. industry, according to a long-range forecast by Conoco, Inc.:

- Growth will be limited to about 0.5% per year. Gasoline demand will fall with improvements in fleet efficiency. Distillate use will rise slowly from rising transport requirements. Resid will recover a bit from recent declines.
- U.S. petroleum demand, which peaked at 19-million b/d in 1978 and fell to 15-million b/d in 1983, is expected to turn upward, rising to 16.5-million b/d by 2000.
- Gasoline use, which peaked at 7.5-million b/d in 1978, will fall 1% annually. Lower gasoline prices have led to a slower rate of improvement in new vehicle fuel efficiency, but the average fleet efficiency will continue to rise as older, less efficient cars are replaced by new ones. Real product price increases in the 1990s will hurry along improvements in fleet efficiency. Approaching saturation of auto use, an aging population (which tends to drive less), and slower economic growth also will contribute to the demand decline.
- Distillate use is expected to rise 1% per year through the year 2000. Increasing diesel fuel demand for transportation will be countered only partially by reduced home heating and industrial use.
- Residual fuel oil consumption, which has fallen 50% from its 1979 peak of 3-million b/d, is forecast to recover somewhat during the next several years. The combination of (1) the economic upturn, (2) reduced expectations regarding nuclear electricity generation, and (3) improved price competitiveness of resid compared to coal will contribute greatly to the recovery.
- Declining U.S. petroleum liquids output, especially after 1990, will fall far short of demand. Total domestic petroleum liquids output is expected to fall to 9-million b/d by the year 2000, a decrease of 1% per year from 1983. This is largely the result of natural decline in crude oil production from mature fields.

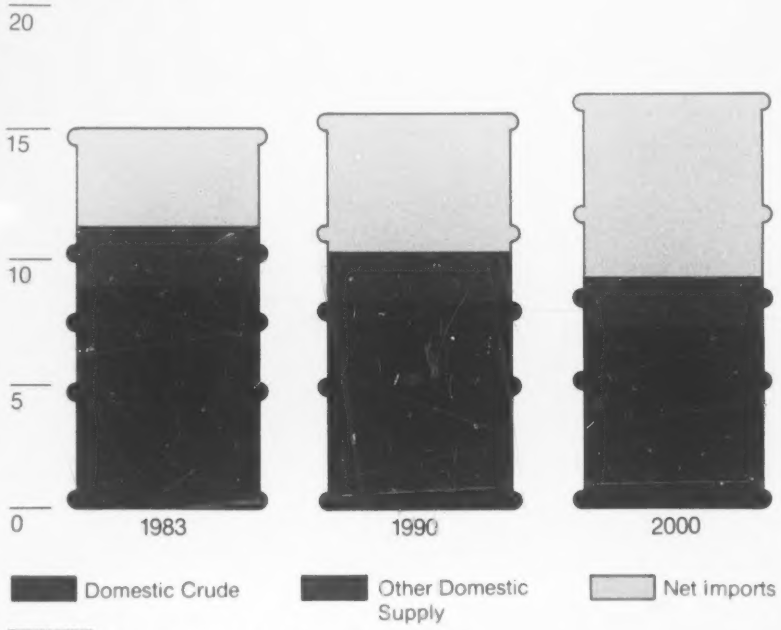
Alaskan North Slope production will peak at almost 2-million b/d in 1990 and fall to less than 1.5-million b/d in 2000, reflecting the decline of the giant Prudhoe Bay Field. Total U.S. crude oil production will fall to 7-million b/d by 2000, down from 8.5-million b/d currently.

As a consequence, the United States will experience an acute increase in dependence on imported oil, from 4-million b/d in 1983 to 7.5-million b/d in 2000. Imports will supply 45% of U.S. oil demand by the end of the forecast period, up from 26% currently. Most of the additional imports probably will have to be obtained from OPEC nations.

U.S. Oil Demand
(Million Barrels Per Day)



U.S. Oil Supply
(Million Barrels Per Day)



Source: Conoco Inc., "World Energy Outlook Through 2000," April 1984

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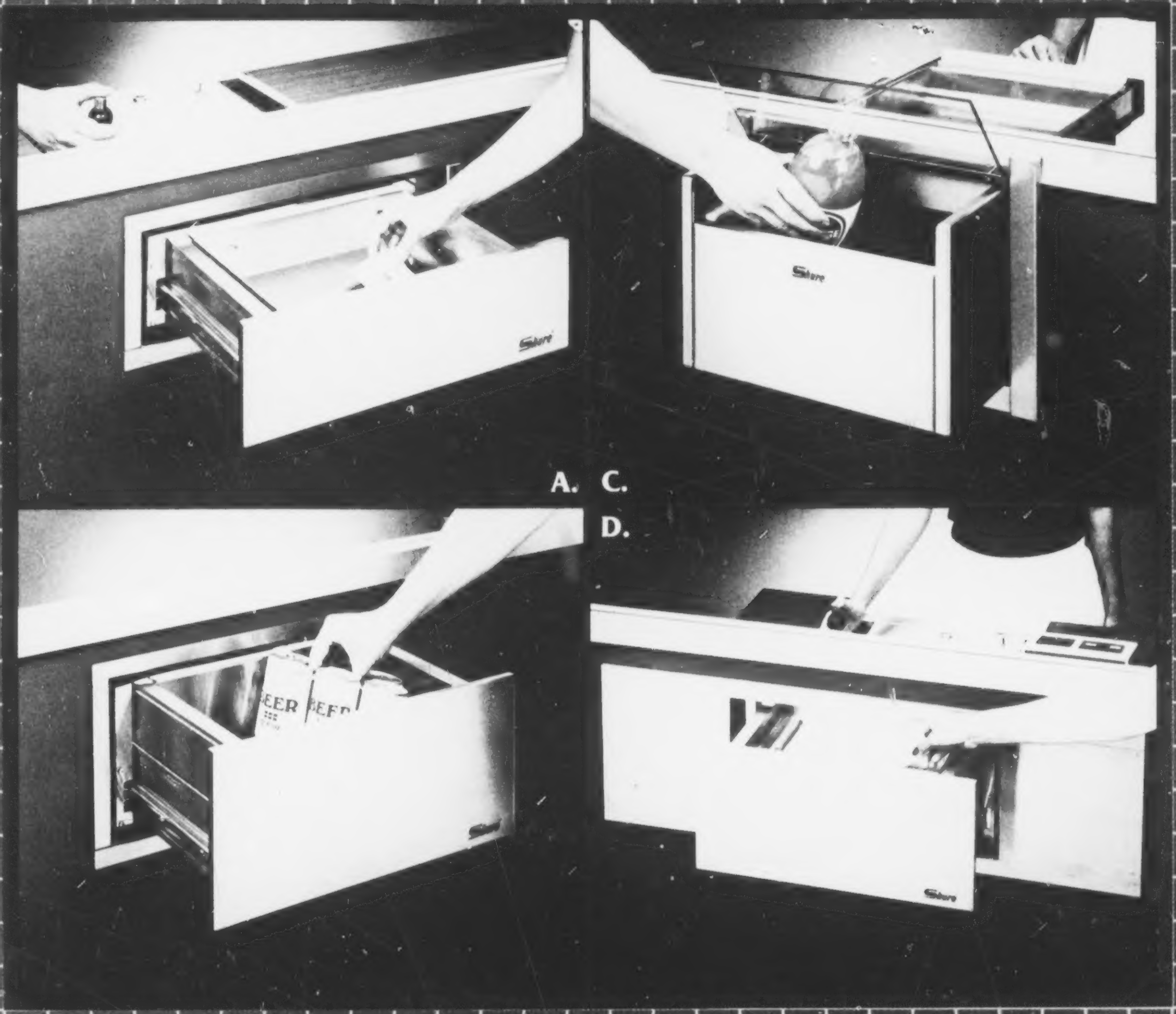

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All-Time Total, Wells Drilled in U.S. (a)

	OIL		GAS		DRY		TOTAL
	Number	%	Number	%	Number	%	Number
PAD District 1							
Florida	246	27.6	4	0.4	641	72.0	891
Maryland	0	0	72	61.5	45	38.5	117
New York	9,001	68.8	3,083	23.6	999	7.6	13,083
Pennsylvania	245,845	79.3	25,626	8.2	38,373	12.3	309,884
Virginia	43	8.5	345	68.6	115	22.9	503
West Virginia	46,870	43.7	40,942	38.2	19,374	18.1	107,186
Total	**302,005**	**69.9**	**70,072**	**16.2**	**59,547**	**13.7**	**431,624**
PAD District 2							
Illinois	73,144	61.1	1,415	1.2	45,201	37.7	119,760
Indiana	36,849	45.4	2,075	2.3	23,053	52.3	61,977
Kansas	109,070	51.6	20,735	9.8	81,714	38.6	211,519
Kentucky	47,453	52.4	9,868	10.9	33,259	36.7	90,580
Michigan	12,991	39.8	2,566	7.9	17,099	52.3	32,656
Missouri	579	33.6	193	11.2	949	55.2	1,721
Nebraska	4,859	30.4	190	1.2	10,909	68.4	15,958
North Dakota	4,399	49.8	83	0.9	4,359	49.3	8,841
Ohio	67,688	46.2	42,894	29.3	35,819	24.5	146,401
Oklahoma	214,994	60.4	38,830	10.9	102,301	28.7	356,125
South Dakota	159	16.7	56	5.9	737	77.4	952
Tennessee	1,165	27.0	942	21.8	2,215	51.2	4,322
Total	**573,350**	**54.5**	**119,847**	**11.4**	**357,615**	**34.0**	**1,050,812**
PAD District 3							
Alabama	826	24.4	510	15.1	2,045	60.5	3,381
Arkansas	16,582	54.4	2,578	8.5	11,346	37.1	30,506
Louisiana	74,352	46.0	26,950	16.7	60,356	37.3	161,658
Mississippi	6,930	32.8	1,139	5.4	13,067	61.8	21,136
New Mexico	26,897	49.3	16,034	29.4	11,608	21.3	54,539
Texas	445,016	58.7	63,797	8.4	248,662	32.9	757,475
Total	**570,603**	**55.4**	**111,008**	**10.7**	**347,084**	**33.7**	**1,028,695**
PAD District 4							
Colorado	8,778	27.2	5,288	16.3	18,301	56.5	32,367
Montana	9,743	36.8	3,889	14.9	12,799	48.3	26,431
Utah	2,687	38.7	1,049	15.1	3,210	46.2	6,946
Wyoming	23,514	51.7	3,244	7.1	18,683	41.2	45,441
Total	**44,722**	**40.2**	**13,470**	**12.1**	**52,993**	**47.6**	**111,185**
PAD District 5							
Alaska	1,063	65.2	114	6.9	453	27.7	1,630
Arizona	53	11.5	34	7.4	374	81.1	461
California	97,873	77.5	2,934	2.3	25,516	20.2	126,323
Nevada	33	11.7	1	0.4	248	87.9	282
Oregon	0	0	11	3.8	281	96.2	292
Total	**99,022**	**76.7**	**3,094**	**2.3**	**26,872**	**20.8**	**128,988**
Atlantic Coast	0	0	0	0	29	100.0	29
Gulf of Mexico Northern	58	21.8	13	4.5	196	73.7	267
Pacific Coast	0	0	0	0	4	100.0	4
Total Federal Waters	**58**	**16.0**	**13**	**0.8**	**229**	**83.4**	**300**
Miscellaneous	3	1.0	0	0.3	554	98.7	557
TOTAL	**1,589,763**	**57.7**	**317,504**	**11.5**	**844,894**	**30.6**	**2,752,161**

(a) To Jan. 1, 1983; totals exclude service wells.
Source: Independent Petroleum Assn. of America, The Oil Industry in Your State-1983

Storage Capacity for Crude Oil and Products

The U.S. oil industry's shell capacity for its primary distribution system shrank modestly in 1983, but there's nothing to be concerned about. The industry has sufficient idle capacity that can be brought back into operation within 90 days or less that would boost total capacity to an all-time high. At the same time in 1983, the working inventories for major products also declined modestly, reflecting the continuing decrease in consumption.

The studies were made by the National Petroleum Council as a follow-up to previous studies made in 1978. Another study on the secondary distribution system recently was finished and is now available. [See page 138.]

Here are the highlights of the report that was issued last November—remembering, of course, that the data is for the primary distribution system only:

Primary Storage Capacity —1978 and 1983

(millions of bbl.)

	3 31 78		3 31 83		
	Tankage in Operation	Under Construction	Tankage in Operation	Under Construction	Idle But Available
Crude oil	462	12	499	10	16*
Gasoline	464	5	456	3	7
Kerosine	86	1	21	1	1
Kero-Jet Fuel			68	—	3
Distillate	336	3	295	1	18*
Residual	156	1	143	4	13*
Total	1,504	22	1,482	19	58

*Includes some that requires environmental waivers to restore to operation

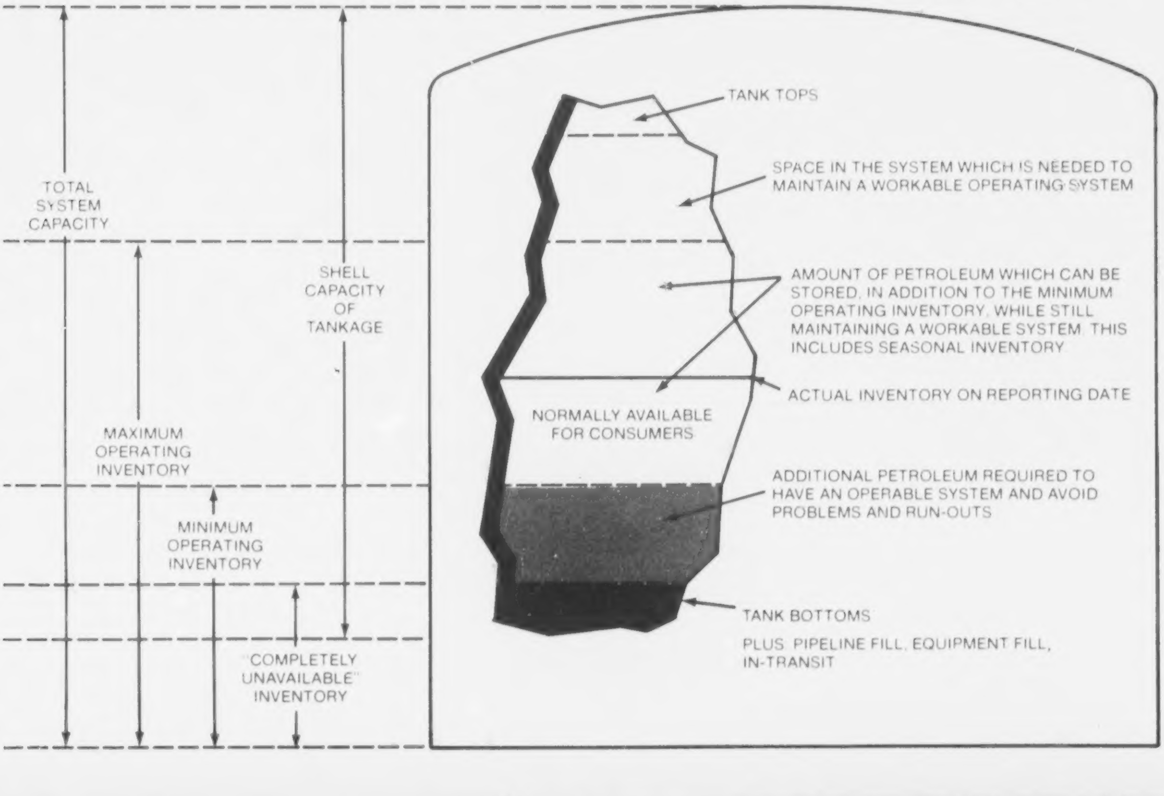
Primary Minimum Operating Inventories—1979 and 1983

(millions of bbl.)

	1979	1983			U.S.
	Total U.S.	PADs 1-4	PAD 5	Total U.S.	Decrease '83 vs '79
Crude oil	290	215	70	285	5
Gasoline	210	176	24	200	10
Kerosine	35	5	—	5	5
Kero-Jet Fuel		20	5	25	
Distillate	125	97	8	105	20
Residual	60	34	6	40	20
Total	720	547	113	660	60

Source: (both tables) National Petroleum Council, Petroleum Inventories and Storage Capacity, November 1983.

Simplified Diagram of Terms Describing Petroleum Inventories and Storage Capacities


TOTAL SYSTEM CAPACITY
SHELL CAPACITY OF TANKAGE
MAXIMUM OPERATING INVENTORY
MINIMUM OPERATING INVENTORY
COMPLETELY UNAVAILABLE INVENTORY
TANK TOPS
SPACE IN THE SYSTEM WHICH IS NEEDED TO MAINTAIN A WORKABLE OPERATING SYSTEM
AMOUNT OF PETROLEUM WHICH CAN BE STORED, IN ADDITION TO THE MINIMUM OPERATING INVENTORY, WHILE STILL MAINTAINING A WORKABLE SYSTEM. THIS INCLUDES SEASONAL INVENTORY
ACTUAL INVENTORY ON REPORTING DATE
NORMALLY AVAILABLE FOR CONSUMERS
ADDITIONAL PETROLEUM REQUIRED TO HAVE AN OPERABLE SYSTEM AND AVOID PROBLEMS AND RUN-OUTS
TANK BOTTOMS
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ESTIMATED STORAGE CAPACITY AND INVENTORY in the U.S. PETROLEUM DISTRIBUTION SYSTEM (as of March 31, 1983)

(millions of bbl.)

	Primary			Secondary			Tertiary			Total U.S.		
	Capacity	Inventory	% Utilized	Capacity	Inventory	% Utilized	Capacity	Inventory	% Utilized	Capacity	Inventory	% Utilized
Gasoline	456	223	48.9%	101	35	34.7%	103	42	40.8%	660	301	45.6%
Kerosine	21	9	42.9	4	1	25.0	(a)	(a)	—	25	10	40.0
Kero-Jet fuel	68	35	51.5	—	—	—	21	11	52.4	89	46	51.7
Distillate fuel oil	295	118	40.0	42	10	23.8	282	131	46.5	619	259	41.8
Residual fuel oil	143	46	32.2	6	2	33.3	237	86	36.3	386	134	34.7
Total (b)	984	431	43.8%	153	48	31.4%	642	269	41.9%	1,779	748	42.0%
Crude oil (c)	499	313	62.7%	—	—	—	—	—	—	499	313	62.7%

(a) Included in distillate fuel oil for the tertiary storage segment; (b) Totals include surveyed products only. These inventory levels and utilization of storage capacity represent satisfactory levels under normal operating conditions, according to NPC. Totals may not add due to independent rounding; (c) Excludes 31-million bbl. of Alaskan North Slope crude oil in transit.
Source: National Petroleum Council, Study of Petroleum Inventories and Storage Capacity, April 1984

Secondary/Tertiary Storage Capacity—1983

In the early part of 1984, the National Petroleum Council took a hard look at the secondary and tertiary storage capacities of the oil marketing industry for the first time.

In the past, the Council said, the secondary and tertiary reports were primarily estimates rather than detailed reviews.

The Council defined the secondary distribution system as: **Bulk Plants**—storage facilities that have a total storage capacity of less than 50,000 bbl. and do not receive petroleum products by barge, ship or pipeline; **Retail Motor Fuel Outlets**—service stations, truck stops, etc. It defined **Tertiary Storage Capacity** as the end users—the utilities, agricultural, commercial, residential, transportation, etc.

Here are the findings, as reported in a draft report prepared for NPC approval in late June:

Estimated Storage Capacity and Inventory in the Secondary Distribution System on 3/31/1983

(millions of bbl.)

	Storage Capacity	Inventory
Motor gasoline	101	35
Kerosine	4	1
Diesel distillate fuel oil	42	10
Residual fuel oil	6	2
Total*	**153**	**48**

*Totals include survey products only

NPC, for the purposes of this study, estimated there were approximately 18,000 companies owning or operating bulk plants in the U.S. on March 31, 1983. It cited these specifics:

Estimated Storage Capacity and Inventory at Bulk Plants as of 3/31/83

(millions of bbl.)

	Storage Capacity	Inventory
Motor Gasoline	22	9
Kerosine	4	1
Diesel distillate fuel oil	17	8
Residual Fuel oil	6	2
Total*	**69**	**20**

*Totals include products surveyed only

Data from several sources were analyzed to determine the number of retail motor fuel outlets as well as their storage capacity and inventories. It was determined that as of March 31, 1983, there were approximately 210,000 retail outlets in the U.S. with an estimated storage capacity of 16,800 gal. and an inventory of about 5,600 gal. The total storage capacity at retail outlets, as of March 31, 1983, was estimated to have been 3,528,000,000 gal., with inventories about 1,176,000,000 gal. This is the breakout:

Estimated Storage Capacity and Inventory at Retail Motor Fuel Outlets as of 3/31/83

(millions of bbl.)

	Storage Capacity	Inventory
Motor Gasoline	79	26
Diesel distillate fuel oil	5	2
Total*	**84**	**28**

*Totals include surveyed products only

For purposes of the NPC study, the tertiary storage segment was divided into seven sectors, as follows:

Estimated Storage Capacity and Inventory in the Tertiary Storage Segment as of 3/31/83

(millions of bbl.)

	Storage Capacity	Inventory
By Sector		
Agricultural	41	14
Commercial	37	8
Electric utilities	213	91
Industrial	61	17
Military Government	56	23
Residential	100	55
Transportation	134	61
Total of Sectors*	**642**	**269**
By Products		
Motor Gasoline	103	42
Kerosine, diesel and distillates	282	131
Kero-Jet fuel	21	11
Residual fuel oil	237	86
Totals*	**642**	**269**

*Totals included surveyed products only; totals may not add due to independent rounding

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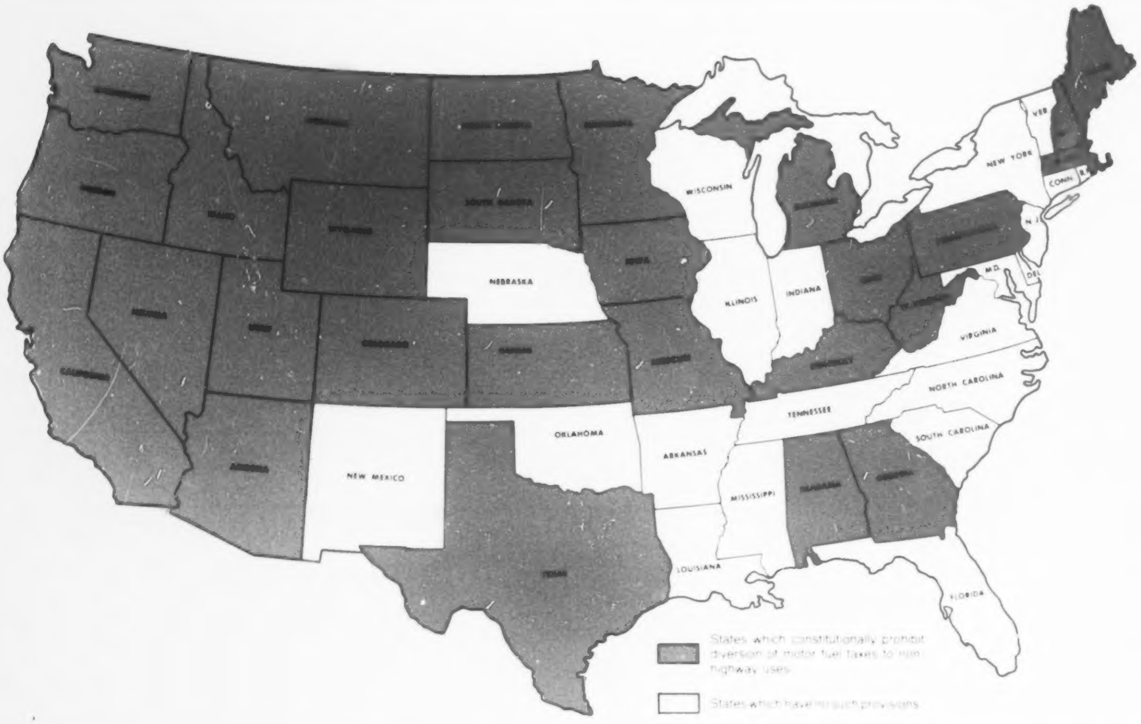


▨ States which constitutionally prohibit diversion of motor fuel taxes to non-highway uses

☐ States which have no such provisions

1983 Tax Collections

State

State	Gasoline tax rates per gal. in 1983	Total state motor fuel tax revenues (Add 000) 1983	1982	% Change
Alabama	11.0c	$248,305	$244,733	1.5%
Alaska	8.0	18,969	18,782	1.0
Arizona	10.0	179,214	132,770	35.0
Arkansas	5.5	128,170	127,574	0.5
California	7.0	1,077,282	811,789	32.7
Colorado	9.0	176,111	130,150	27.5
Connecticut	11.0	188,887	154,206	22.5
Delaware	11.0	37,988	33,795	12.4
Dist. of Columbia	14.0	27,198	21,791	24.8
Florida	8.0	516,450	423,549	21.9
Georgia	7.5	255,781	250,157	2.2
Hawaii	8.5	27,880	27,422	1.7
Idaho	12.5	74,339	60,427	23.0
Illinois	7.5	475,334	365,043	29.5
Indiana	11.1	321,904	319,297	0.8
Iowa	13.0	213,280	172,162	23.9
Kansas	8.0	131,553	117,590	11.9
Kentucky	10.0	196,600	197,454	0.4
Louisiana	8.0	193,838	193,311	0.3
Maine	9.0	72,687	49,694	46.2
Maryland	11.0	266,462	216,537	23.0
Massachusetts	10.4	258,992	260,305	0.5
Michigan	11.0	491,287	424,448	15.7
Minnesota	13.0	293,253	258,961	13.2
Mississippi	9.0	127,869	127,837	0.0
Missouri	7.0	216,485	191,603	13.0
Montana	9.0	69,107	47,544	45.3
Nebraska	14.0	130,248	115,988	12.3
Nevada	12.0	65,464	61,788	5.9
New Hampshire	14.0	61,627	59,577	3.4
New Jersey	8.0	296,323	289,318	2.4
New Mexico	10.0	98,583	85,896	14.8
New York	8.0	475,618	462,356	2.9
North Carolina	12.0	395,036	376,941	4.8
North Dakota	8.0	44,603	33,897	31.6
Ohio	11.7	613,752	576,225	6.5
Oklahoma	6.5	144,862	132,135	9.6
Oregon	8.0	115,358	95,544	20.7
Pennsylvania	11.0	742,853	720,515	3.1
Rhode Island	11.0	47,250	42,830	10.3
South Carolina	13.0	231,998	222,689	4.2
South Dakota	13.0	52,817	54,930	3.8
Tennessee	9.0	280,515	278,611	0.7
Texas	5.0 c	$511,263	$498,864	2.5%
Utah	11.0	84,447	81,251	3.9
Vermont	11.0	31,978	28,236	13.3
Virginia	11.0	411,755	340,000	21.2
Washington	12.0	307,780	240,846	27.8
West Virginia	10.5	123,516	98,55[illegible]	25.3
Wisconsin	13.0	305,112	287,951	6.0
Wyoming	8.0	35,297	37,748	6.5
Total	**9.07c**	**$11,893,280**	**$10,610,419**	**12.1%**

Note: Gasoline taxes are for gasoline only. Total revenues include other receipts. 1983 data are estimates.

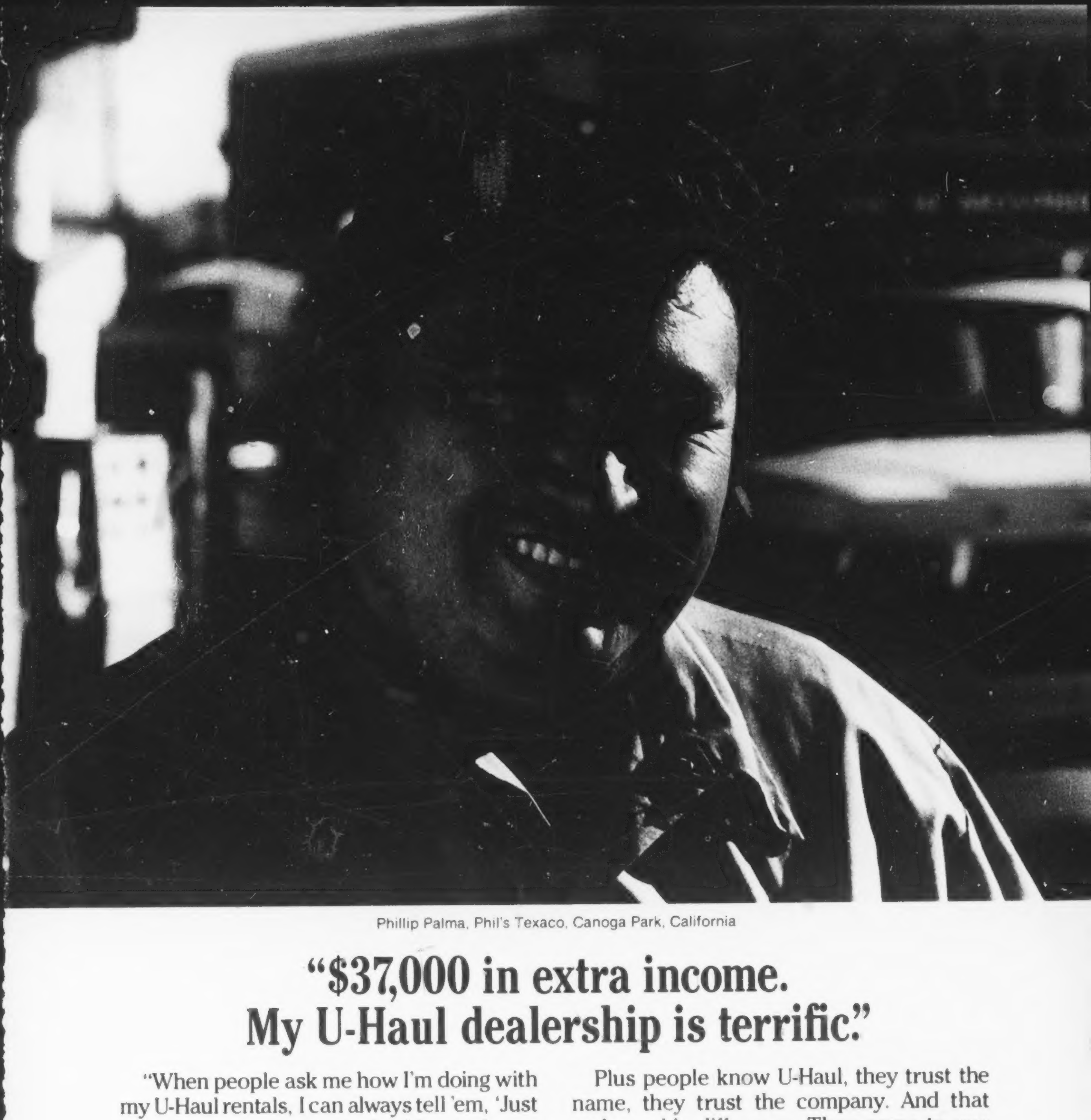
Source: Federal Highway Administration, Table SS82-2, October 1983.

Federal (Add 000)

Year	Gasoline(a)	Diesel and special fuels(a)	Lube oil(b)	Total
1983(c)	$6,091,841	$957,988	$80,847	$7,130,676
1982	4,120,013	594,083	76,181	4,790,277
1981	3,801,795	570,477	74,695	4,446,967
1980	4,019,481	518,352	78,835	4,616,668
1979	4,282,919	508,595	82,335	4,873,849
1978	4,381,950	488,064	79,047	4,949,061
1977	4,229,721	452,631	78,830	4,761,182
1976	4,140,924	408,560	70,135	4,619,619
1975	3,884,483	362,675	66,124	4,313,282
1974	3,854,505	373,302	78,155	4,305,962
1973	3,958,682	358,120	86,266	4,403,068
1972	3,736,545	321,551	85,841	4,143,937
1971	3,513,927	275,159	67,130	3,856,216
1970	3,408,505	264,815	65,862	3,739,182
1969	3,172,243	240,650	86,338	3,499,231

(a) 4¢/gal. in first quarter, then 9¢/gal. after April 1, 1984. (b) 6¢/gal. (c) Figures for 1983 are fiscal year gross collections that went to the Highway Trust Fund, since net IRS calendar year information was not available. All other figures represent calendar year net collections after refunds and include the taxes the federal government pays on its own purchases.

Source: U.S. Department of Transportation, Federal Highway Administration.



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"When people ask me how I'm doing with my U-Haul rentals, I can always tell 'em, 'Just great.' Last year my dealership made me $37,000 — that's extra income, and it comes in every month.

It's a terrific set-up. You just rent out the equipment. There's no fee, nothing to pay. How can you lose? U-Haul is good equipment, good management. And they take care of the advertising. That brings in customers. Be good to them and they'll keep coming in.

Plus people know U-Haul, they trust the name, they trust the company. And that makes a big difference. They come to you first. Work with a well-known, dependable company and you can't go wrong.

Would I recommend it? Absolutely."

U-HAUL®

To find out how you can become a U-Haul dealer, call John Huemmrich, U-Haul International (toll-free) 1-800-528-0361, or write P.O. Box 21503, Dept. NPN, Phoenix, AZ 85036.

THE NATIONAL VEHICLE POPULATION PROFILE (NVPP)

FROM R.L. POLK

For more than 60 years, R. L. Polk & Co. has been the official scorekeeper for the car and truck manufacturers serving America.

Now, the recent development of the NVPP, a unique census of vehicles currently registered and in operation in the U.S., has positioned Polk on the "cutting edge" of the development of *new* and *powerful* market planning tools for the automotive aftermarket.

Armed with these tools, contemporary market planners will now maximize their effectiveness in such key decision areas as:

- Product Planning
- Distribution Planning
- Forecasting
- Advertising
- Sales Administration

THE NVPP

describes domestic cars, import cars and trucks in terms of:

- Make (Chevrolet, Ford, Datsun, etc.)
- Series (Monte Carlo, Mustang, B-210, etc.)
- Body Style (2 door, coupe, van, etc.)
- Fuel Type (Gasoline, diesel)
- Engine Size (cylinder count, CID/cc, carburetion/fuel injection)
- Year Model (1968-82)

Geographically, it is compiled to the county, state and U.S. levels and can be summarized in your organization's unique territories, regions, etc.

NVPP

For more information, please call or write:

INQUIRIES:

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R. L. POLK & CO.
431 Howard Street
Detroit, MI 48231
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Carson, California 90746
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Outlook for Tires and Batteries at Stations

Year	Replacement passenger tire shipments: Total (in millions)	Replacement passenger tire shipments: Station sales (a) (in millions)	Replacement passenger tire shipments: Average per station (a)	Replacement automotive-type battery shipments: Total (in millions)	Replacement automotive-type battery shipments: Station sales (a) (in millions)	Replacement automotive-type battery shipments: Average per station (a)
1983	134	26.8	196.2	56.1	16.8	123
1982	132	26.4	182.5	54.2	16.3	113
1981	126	25.2	166.6	53.6	16.1	106
1980	107	21.4	135	50.0	15.0	95
1979	122	24.4	148	53.7	16.1	102
1978	135	27.0	157	56.3	16.9	102
1977	130	26.0	148	54.6	16.4	95
1976	123	24.6	132	49.2	14.8	84
1975	125	23.7	125	42.6	12.7	67
1974	124	24.8	127	44.4	13.3	68
1973	142	28.4	130	43.5	13.1	60
1970	130	26.0	118	37.9	11.4	51

(a) Estimates based on service stations holding 20% of the replacement market, and 30% of the replacement battery market.

Source: Tire and battery totals from Rubber Manufacturers Assn. and Battery Council International and estimates by NPN.

Battery Shipments Improve in 1983

Battery shipments (replacement and original) showed marked improvement in 1983, according to Battery Council International. Replacements were up 3.5%—56.1-million in 1983 versus 54.2-million in 1982. Original equipment shipments rose too, as the automotive industry experienced one of its best selling years in a long time. The total market soared toward the 70-million unit level.

(Add 000)

Year	Replacements	% of Market	New cars & trucks	% of Market	Total market	% Change from previous year
1983	56,105	83.8%	10,823	16.2%	66,928	7.9%
1982	54,214	87.4	7,819	12.6	62,033	0.8
1981	53,598	87.1	7,956	12.9	61,554	6.0
1980	50,063	86.2	8,009	13.8	58,072	11.0
1979	53,746	82.4	11,480	17.6	66,226	6.2
1978	56,389	81.4	12,910	18.6	62,299	3.0
1977	54,601	81.2	12,639	18.8	67,240	10.8
1976	49,202	81.0	11,477	19.0	60,679	17.6
1975	42,562	32.5	8,985	17.6	51,567	5.3
1973	43,453	77.5	12,637	22.5	56,090	2.9
1970	37,389	81.9	8,239	18.1	45,629	0.5

Source: Replacement battery figures supplied by Battery Council International. New cars and trucks are U.S. factory sales figures provided by Motor Vehicle Manufacturers Assn.

Replacement Batteries

Replacement battery shipments totaled 56.1-million units in 1983, with 12-volt and 6-volt accounting for 89.9% of the total, according to Battery Council International. Here are the highlights of its annual report:

Replacement Batteries:

Passenger cars and light trucks:

12-volt: 45,079,961, or 80.4% of the total; 6-volt: 1,282,698, or 2.3% of the total.

Heavy duty commercial:

12-volt: 2,379,621, or 4.2% of the total; 6-volt: 1,704,981, or 3.0% of the total.

Original Equipment:

Passenger cars and light trucks:

12-volt: 9,576,604, or 88.5% of the total; 6-volt: 34,445, or 0.3% of the total.

Heavy duty commercial:

12-volt: 499,847, or 4.6% of the total; 6-volt: 44,671, or 0.04% of the total.

Source: Battery Council International

Where Batteries Are Sold

Shipments in Units

Channels of Distribution	1983: Private Brands	1983: Mfg. Own Brand	1983: Total	1982: Private Brands	1982: Mfg. Own Brand	1982: Total
Gasoline and Oil	1,932,053	220,317	2,152,370	2,396,499	325,937	2,722,436
Tires and Rubber	2,371,630	280,174	2,651,804	1,850,808	331,496	2,182,304
Department and Discount Stores	13,146,744	71,119	13,217,863	14,155,053	178,791	14,333,844
Auto Chains and Others	5,439,699	522,726	5,962,425	4,938,424	240,926	5,179,350
Fleet Operations	8,121	338,655	346,776	6,564	300,879	307,443
Vehicle & Equipment Mfrs.	2,055,998	331,847	2,387,845	2,745,089	352,937	3,098,026
Parts Distribution	4,098,283	5,199,135	9,297,418	3,785,244	5,028,640	8,813,884
Battery Specialists	13,237,648	3,885,005	17,122,653	11,891,449	3,759,963	15,651,412
Other	346,137	195,305	541,442	260,064	295,342	555,406
Total	**42,636,313**	**11,044,283**	**53,680,596**	**42,029,194**	**10,814,911**	**52,844,105**

Source: Battery Council International, figures based on estimates submitted by 20 member firms.

Tire Shipments Blossom in 1983

Tire shipments bounced upwards in 1983, reflecting increases in new car sales. After 1982's floundering, this was good news for the tire manufacturers, who haven't had too much to be glad about in recent years.

All of the tire shipments were up in 1983 except those of original equipment for farm vehicles. These fell off 9%, indicating, perhaps, a slowing down of farm equipment purchases pending better times.

'83 vs. '82	Passenger Motorcycles	Bus Truck	Farm Equipment	Total by Type of Market
Original Equipment	+ 28.6%	+ 18.6%	9.0%	+ 26.5%
Replacement	+ 2.5	+ 7.6	+ 3.9	+ 3.4
Export	+ 40.6	+ 6.6	+ 17.3	+ 31.8
Total by Type	**+ 8.4%**	**+ 9.1%**	**+ 0.4%**	—

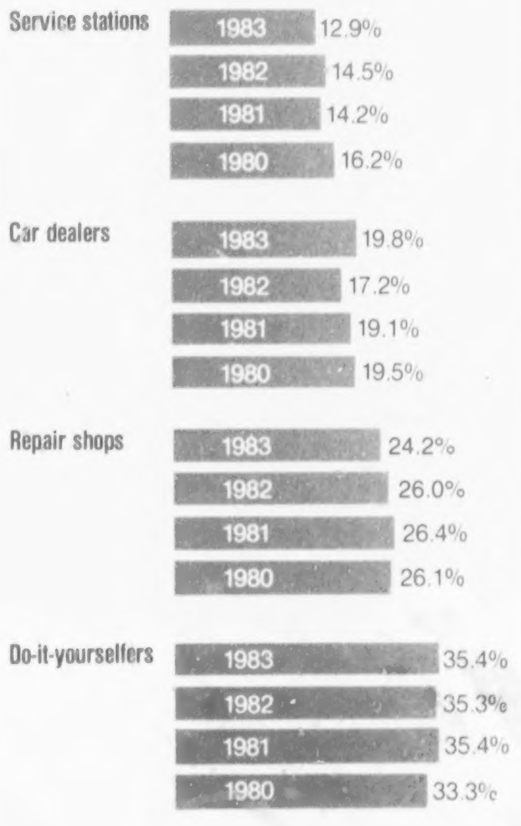
Source: NPN, based on Rubber Manufacturers Assn. Monthly Statistical Report.

Auto, Truck and Farm Tire Shipments

	Type of Tire (Add 000)							
	Passenger Motorcycle	% of Market	Bus Truck	% of Market	Farm Equipment	% of Market	Total of Market Type	% of Total
1983								
Original Equipment	43.912	87.2%	5.519	11.0%	912	1.8%	50.543	22.3%
Replacement	134.818	80.6	30.301	18.1	2.191	1.3	167.310	75.0
Export	4.290	78.6	1.030	18.9	135	2.5	5.455	2.4
Total	**183,020**	**82.0%**	**36,850**	**16.5%**	**3,238**	**1.5%**	**223,108**	—
1982								
Original Equipment	34.150	85.8%	4.652	11.7%	1.003	2.8%	39.805	19.3%
Replacement	131.563	81.3	28.149	17.4	2.108	1.3	161.820	78.6
Export	3.051	73.8	966	23.4	115	2.8	4.132	2.0
Total	**168,764**	**82.0%**	**33,767**	**16.4%**	**3,226**	**1.6%**	**205,757**	—

Source: Rubber Manufacturers Assn., Monthly Statistical Report

Where consumers get tuneups



Source: Champion Spark Plug Co.

1983 Ethylene Glycol-Base Antifreeze Sales

	(Add 000 gal.)	
	Civilian	Government
Packaged ethylene glycol antifreeze in quarts	204.890	-0-
in gallons	133.303.749	-0-
in drums	12.314.181	-0-
Total	**145,822,820**	**-0-**
Bulk ethylene glycol antifreeze (or ethylene glycol for antifreeze) sold to packagers	59.688.409	-0-
Bulk ethylene glycol antifreeze (or ethylene glycol for antifreeze) sold to motor vehicle manufacturers for "drive-away" or factory fill use	16.761.344	-0-
Grand total	**222,272,573**	(*)

1982 Ethylene Glycol-Base Antifreeze Sales

	(Add 000 gal.)	
	Civilian	Government
Packaged ethylene glycol antifreeze sold in quart and gallon sizes	134.902.646	-0-
in drums	10.969.905	(*)
Total	**149,872,551**	(*)
Bulk ethylene glycol antifreeze (or ethylene glycol for antifreeze) sold to packagers	55.663.282	(*)
Bulk ethylene glycol antifreeze (or ethylene glycol for antifreeze) sold to motor vehicle manufacturers for "drive-away" or factory fill use	13.323.638	
Total	**214,859,471**	**2,306,164**
Grand total (civ. and gov't.)		**217,165,635**

(*) Data not shown, except for total, to avoid disclosure of individual company data.
Source: Chemical Specialties Manufacturers Assn.

Shrinkage Hurts But Helps Parts Business

It was obvious in the way the Department of Commerce changed its population forecasts for 1983 and 1984 that the recession had taken a hefty toll in the automotive products and service business last year and would inhibit growth again this year.

Nevertheless, with fewer places of business, the outlook per store brightened considerably. The Commerce Department predicted the 1983 sales average would r[illegible] $240,000 per store, up $17,000 over last year's forecast. It predicted also that the 1984 average would be around $253,000—an increase of 5.4% if all goes well.

The Commerce Department was rather negative in its forecast on the store population. Not only did it scale down its 1983 projection, it also suggested that 1984 would be a no-growth period, perhaps sinking back to the 1982 level.

Automotive Products/Services (a)

	1984 (b)	1983 (b)	1982
Total number of establishments	36,660	37,241	36,614
Company-owned	4,358	4,275	4,233
Franchisee-owned	34,302	32,966	32,381
Total sales of products and services (Add $000)(c)	9,781,812	8,849,456	8,278,361
Company-owned(c)	3,052,068	2,828,114	2,609,805
Franchisee-owned(c)	6,729,744	6,121,342	5,658,756
Average sales per establishment(c)	$253,000	$240,000	$226,000
Company-owned	700,000	662,000	616,000
Franchisee-owned	196,000	185,000	175,000

(a) Includes tire, battery and accessory stores; auto and truck wash services; and brake and muffler repair and service; (b) Data estimated by respondents; (c) Includes sales of non-automotive products such as household appliances, garden supplies, etc.
Source: Franchising in the Economy, 1982-1984, Bureau of Industrial Economics, U.S. Department of Commerce

Drain Intervals

1984 Crankcase Drain Intervals and Recommended Oil

		Normal Service		Severe Service		
Make	Engine	Miles	Months	Miles	Months	Type Of Oil
American Motors	All	7,500	7.5	—	—	SF
Chrysler Corp.	All (Ex-Turbo)	7,500	12	3,000	3	SF
	Turbo	7,500	6	3,000	3	SF-CC
Ford Motor Co	4 (Turbo)	5,000	12	3,000	3	SF
	Turbo	7,500	6	3,000	3	SF-CC SF-CD
	Others (Ex-Diesel)	7,500	12	3,000	3	SF SF-CC SF-CD
General Motors	Gasoline	7,500(a)	12	3,000(a)	3	SF SF-CC SF-CD
	4-cyl. Diesel	3,750	12	2,000	3	SF-CC
	6&8-cyl. Diesel	5,000	—	2,500	3	SF-CC SF-CD

(a) 4-cyl. turbo, 3,000 miles or 3 months.
Source: Gousha Chek-Chart

1984 Automatic Transmission Drain Intervals and Recommended Fluids

		Normal Service		Severe Service	
Make	Fluid	Months	Miles	Months	Miles
American Motors	Dexron®-II	30	30,000	—	—
Chrysler Corp	Dexron®-II (a)	—	(b)	—	15,000
Ford Motor Co	Dexron®-II (a)(c)	—	(b)	—	30,000
General Motors	Dexron®-II (a)	—	100,000	—	15,000

(a) Including automatic transaxles
(b) Drain not required for normal service
(c) C-5 trans. uses type H Fluid
Source: Gousha Chek-Chart

1984 Chassis Lubrication Intervals

	Normal Service		Severe Service			
Make	Months	Miles	Months	Miles	Type	Part Specification No.
American Motors	7.5	7,500(a)	Shorter - intervals		#2 Lithium	8993630
Chrysler Corp.	36	30,000	18(a)	15,000	#2 Barium EP	4318062
Ford Motor Co.	—	30,000	Shorter - intervals		#2 Lithium (suspension)	
						MIC75-B
					#4-5 Lithium (steering)	MIC92-All
General Motors						
Gasoline	12	7,500	Shorter - intervals		#1-2 Multipurpose EP	6031-M
Diesel	12	5,000	Shorter - intervals		#1-2 Multipurpose EP	6031-M7

(a) Except front-wheel drive models
Source: Gousha Chek-Chart. Reprinted with permission.

Service Job Analysis

by station size—repair volume (a)
(add 000)

Job Number and Description	% Stations Performing	Total Jobs Performed (add 000)	Under $20	% of Jobs	$20-39	% of Jobs	$40-59	% of Jobs	$60-100	% of Jobs	Over $100	% of Jobs
Lube Jobs (Car)	98.4	63.829	2.513	3.9	8.858	13.9	6.501	10.2	19.672	30.8	26.285	41.2
Lube Jobs (Truck Bus)	67.9	8.450	253	3.0	1.471	17.4	946	11.2	2.529	29.9	3.251	38.5
Oil Changes (Car)	96.6	68.121	2.816	4.1	8.961	13.2	7,107	10.4	20,704	30.4	28.533	41.9
Oil Filters Replaced (Car)	97.0	63.019	2.559	4.1	8.311	13.2	6.289	10.0	19.304	30.6	26.556	42.1
Air Filters Replaced	86.1	23.053	879	3.8	2.244	9.7	1.826	7.9	5.328	23.1	12.776	55.4
Front Wheels Repacked (Car)	84.3	11,602	242	2.6	1.162	12.2	926	9.8	2.568	27.1	4.588	48.4
Oil Changes (Truck Bus)	65.8	7,763	206	2.7	1.392	17.9	720	9.3	2.308	29.7	3,137	40.4
Oil Filters Replaced (Truck Bus)	63.1	6.631	158	2.4	1.222	18.4	574	8.7	1,751	26.4	2,926	44.1
Carburetors Installed (New)	24.3	557	9	1.6	38	6.8	30	5.4	115	20.6	365	65.5
Carburetors Installed (Rebuilt)	32.6	836	16	1.9	64	7.7	103	12.3	243	29.1	410	49.0
Carburetors Cleaned on Vehicles	44.8	3.431	41	1.2	240	7.0	265	7.7	664	19.4	2.221	64.7
Carburetors Overhauled (In Shop)	42.9	1,718	28	1.6	131	7.6	104	6.1	429	25.0	1,026	59.7
Fuel Pumps Installed (New)	52.7	1,476	32	2.2	120	8.1	115	7.8	393	26.6	816	55.3
Fuel Pumps Installed (Rebuilt)	18.0	514	37	7.2	64	12.5	45	8.8	169	32.9	199	38.7
Fuel Filters Replaced	84.2	13,496	301	2.2	1,252	9.3	1,110	8.2	3.507	26.0	7.326	54.3
Engine Tune-Ups (Car)	87.9	15,767	314	2.0	1,753	11.1	1,469	9.3	3.844	24.4	8.387	53.2
Engine Tune-Ups (Truck Bus)	41.4	1,871	23	1.2	206	11.0	158	8.4	422	22.6	1.062	56.8
Spark Plugs (New)	82.3	95,091	1,968	2.1	11,072	11.6	9,375	9.9	22,772	23.9	49.904	52.5
Spark Plugs (Clnd Regapped Reinstalled)	24.8	12.133	348	2.9	1.267	10.4	828	6.8	1,757	14.5	7,933	65.4
Batteries Sold	94.4	10,736	454	4.2	1.653	15.4	898	8.4	2.992	27.9	4,739	44.1
Batteries Recharged	97.1	22,773	1.017	4.5	3.328	14.6	2.617	11.5	5,944	26.1	9,807	43.3
Battery Cables Sold	82.7	6.631	304	4.6	1.082	16.3	569	8.6	1,611	24.3	3.065	46.2
Alternators Installed (New)	16.6	666	31	4.7	143	21.5	35	5.3	144	21.6	313	47.0
Alternators Installed (Rebuilt)	73.0	4.686	91	1.9	554	11.8	551	11.8	1.202	25.7	2.288	48.8
Voltage-Regulators Installed (New)	61.4	2.442	63	2.6	270	11.1	205	8.4	748	30.6	1.156	47.3
Voltage-Regulators Installed (Reblt)	7.3	269	10	3.7	46	17.1	72	26.8	55	20.4	86	32.0
V-Belts Installed (All Types)	92.4	21.908	97	4.4	2.978	13.6	1.992	9.1	5.626	25.7	10.341	47.2
Radiator Hose Replaced (Rubber)	87.7	9.908	476	4.8	1.527	15.4	1.055	10.6	2.222	22.4	4.628	46.7
Heater Hose Replaced (Rubber)	76.8	5.972	237	4.0	631	10.6	571	9.6	1,337	22.4	3.196	53.5
Permanent Anti-Freeze Sold (Gals)	90.6	30.408	1.546	5.1	4.051	13.3	2.640	8.7	7.663	25.2	14.508	47.7
Mufflers Replaced (Car)	78.2	5.083	118	2.3	574	11.3	479	9.4	1.028	20.2	2.884	56.7
Mufflers Replaced (Truck Bus)	24.5	638	15	2.4	116	18.2	56	8.8	124	19.4	327	51.3
Tires Sold (Car-New)	86.3	19.354	639	3.3	2.457	12.7	1,890	9.8	4.859	25.1	9.509	49.1
Tires Sold (Truck Bus-New)	24.9	1,671	15	.9	156	9.3	146	8.7	470	28.1	884	52.9
Retread Tires Sold (Car)	22.4	1.929	95	4.9	401	20.8	291	15.1	479	24.8	663	34.4
Retread Tires Sold (Truck Bus)	5.5	449	0	0.0	41	9.1	32	7.1	145	32.3	231	51.4
Tires Repaired	96.9	57,142	3,562	6.2	9,586	16.8	5,922	10.4	14.302	25.0	23,770	41.6
Tubes Sold (New)	66.6	4.153	254	6.1	750	18.1	306	7.4	1.062	25.6	1,781	42.9
Tubes Repaired	78.8	5.676	520	9.2	940	16.6	375	6.6	1,486	26.2	2,355	41.5
Engine Oil Additives Sold (Cans)	68.3	8.795	732	8.3	1,472	16.7	907	10.3	2.017	22.9	3,667	41.7
Gasoline Additives Sold (Cans)	70.1	12.309	1,029	8.4	2.142	17.4	1.079	8.8	3.125	25.4	4,934	40.1
Gear Lube Additives Sold (Cans)	19.2	1.246	99	7.9	254	20.4	103	8.3	264	21.2	526	42.2
Transmission Additives Sold (Cans)	50.6	3.018	132	4.4	497	16.5	242	8.0	710	23.5	1,437	47.6
Cooling System Additives Sold (Cans)	68.6	7,111	326	4.6	817	11.5	764	10.7	1,477	20.8	3.727	52.4
Cooling System Cleaner Sold (Cans)	60.2	4.228	219	5.2	562	13.3	362	8.6	926	21.9	2.159	51.1
Cooling System Sealer Sold (Cans)	72.6	6.550	383	5.8	880	13.4	880	13.4	1,476	22.5	2.931	44.7
Windshield Wiper Arms Replaced	35.2	1,010	21	2.1	117	11.6	84	8.3	267	26.4	521	51.6
Windshield Wiper Refills Installed	86.2	21,132	977	4.6	3.449	16.3	2,195	10.4	5,157	24.4	9.354	44.3
Windshield Wiper Blades Replaced	76.2	10.527	609	5.8	1.548	14.7	1.073	10.2	2.649	25.2	4.648	44.2
Windshield Washer Pumps Replaced	37.4	1.073	25	2.3	118	11.0	111	10.3	328	30.6	491	45.8
Engines Steam Cleaned (External)	19.2	888	6	.7	192	21.6	96	10.8	129	14.5	465	52.4
Gasoline Pumps (Number)	100.0	651	58	8.9	93	14.3	86	13.2	153	23.5	261	40.1
Service Bays (Number)	96.5	271	20	7.4	42	15.5	32	11.8	70	25.8	107	39.5

(a) Repair volume includes parts and labor.
Source: Hunter Publishing Co., Triennial Service Job Analysis: 1982

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*Offer expires December 31, 1984. Aviation and industrial plugs excepted.

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Average Annual Yields from 1 Bbl. of Crude Oil

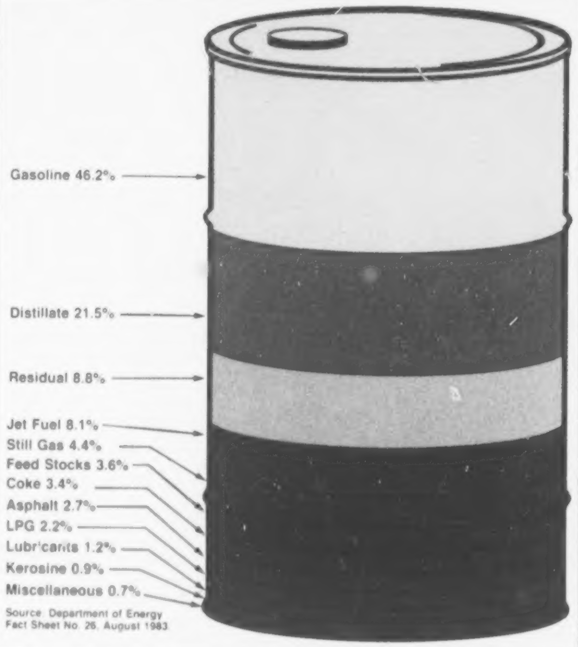
In looking at these yield patterns, it must be remembered that the product percentages vary in relation to the refiner's maximization technology. Data used in this concept is for 1982, as compiled by the Department of Energy.

Here are the yields for a standard 42-gal. bbl.:

Product	Gallons	Product	Gallons
Gasoline	19.40	Asphalt	1.13
Distillate	9.03	Coke	1.43
Residual	3.70	LP-Gas	0.92
Jet Fuel	2.40	Kerosine	0.38
Feedstocks	1.51	Lubricants	0.50
Still Gas	1.85	Miscellaneous	0.58

(These yields total 42.83 gal. mostly as a result of hydrogen processing gains. Similarly, in the chart at the right, the percentages include 3.7% processing gains.)

Legend has it that the 42-gal. bbl. dates back to the 15th century when King Edward IV of Norway standardized the herring barrel at 42 gal. Subsequently this became a standard for whiskey barrels in the U.S. The oil barrel was modeled after that in 1866 for all U.S. shipments. Canada uses an imperial gallon which is larger than the U.S. variety, while most countries overseas use the metric system for weights and measures.



Source: Department of Energy Fact Sheet No. 26, August 1983

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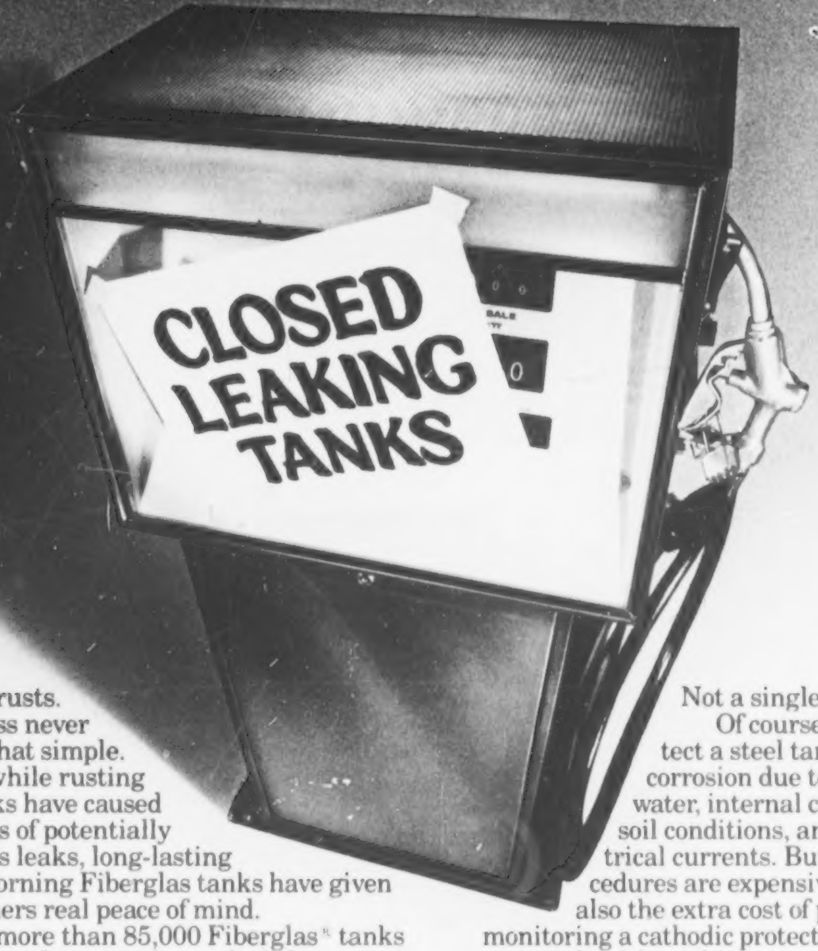

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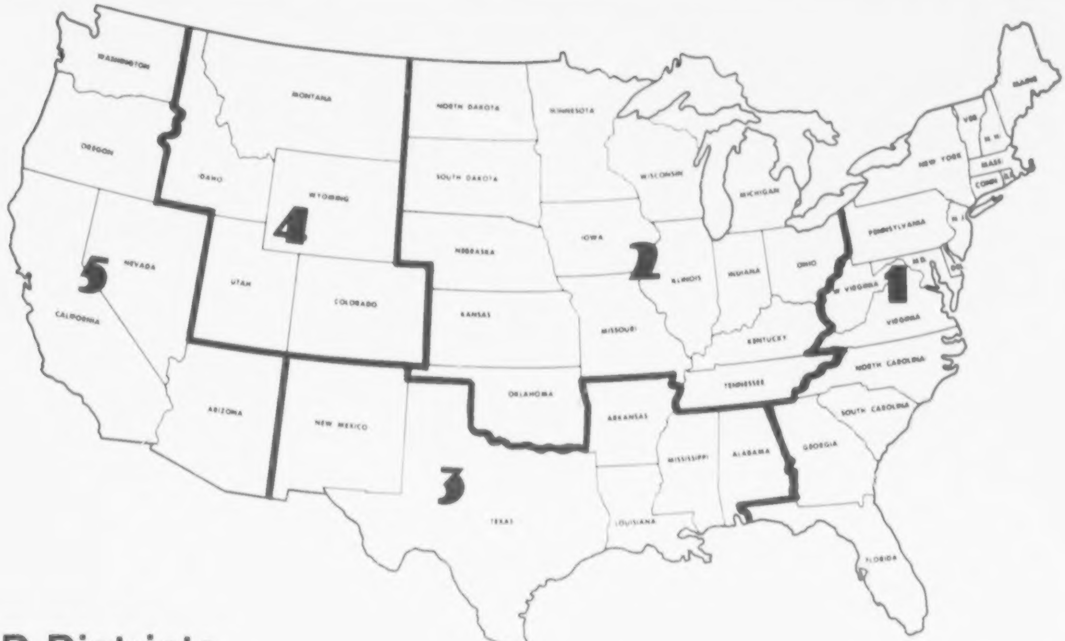
	2. Check anode connection in OSHA approved hole.
	3. Check dielectric bushings on piping fitting connections.
	4. Install with proper compaction of backfill.
	5. Install equipment to detect when anodes are operating or sacrificed.
	6. Replace sacrificial anodes when necessary.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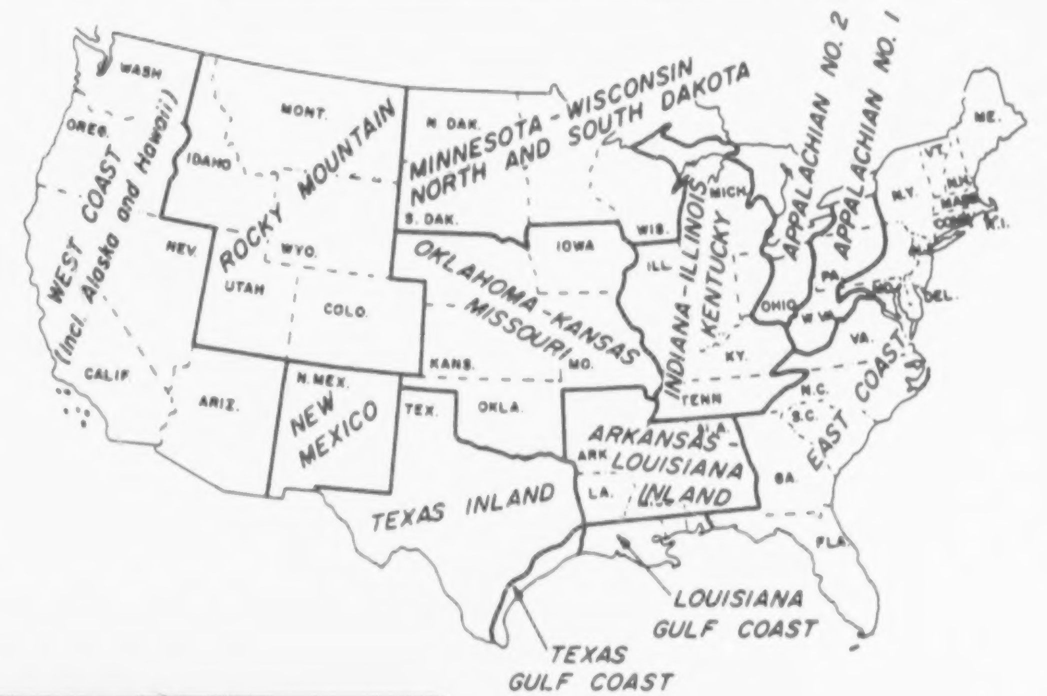
PAD Districts

PAD 1: Connecticut, Delaware, District of Columbia, Florida, Georgia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, North Carolina, Pennsylvania, Rhode Island, South Carolina, Vermont, Virginia, and West Virginia; **PAD 2:** Illinois, Indiana, Iowa, Kansas, Kentucky, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, Oklahoma, South Dakota, Tennessee, and Wisconsin; **PAD 3:** Alabama, Arkansas, Louisiana, Mississippi, New Mexico, and Texas; **PAD 4:** Colorado, Idaho, Montana, Utah, and Wyoming; **PAD 5:** Alaska, Arizona, California, Hawaii, Nevada, Oregon, and Washington.

Source: Energy Data Reports, Department of Energy

BUREAU OF MINES REFINING DISTRICTS


WASH
OREG.
CALIF.
NEV.
ARIZ.
WEST COAST (Incl. Alaska and Hawaii)
IDAHO
MONT.
WYO.
UTAH
COLO.
ROCKY MOUNTAIN
N. MEX.
NEW MEXICO
N. DAK.
S. DAK.
MINNESOTA - WISCONSIN NORTH AND SOUTH DAKOTA
IOWA
KANS.
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OKLA.
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TEXAS INLAND
ARK.
LA.
ARKANSAS - LOUISIANA INLAND
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ILL.
MICH.
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OHIO
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PA.
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APPALACHIAN NO. 1
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EAST COAST
LOUISIANA GULF COAST
TEXAS GULF COAST

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U.S. Refineries and Capacities by States

(Crude Oil Operable Capacity on Jan. 1, 1983)

(* after number indicates capacity shut down but capable of being placed in operation within 90 days.)

Company	b/d
Alabama: Gulf	
Louisiana Land & Exploration Co., Mobile	80,000
Marion Corp., Theodore	25,000
Mobile Bay Refining Co., Chickasaw	26,600
Total	**131,600**
Alabama: Inland	
Hunt Oil Co., Tuscaloosa	33,500
Vulcan Refining Co., Tuscaloosa (Formerly Coral Petroleum	9,500*
Warrior Asphalt Co. of Alabama, Holt	4,000
	1,500*
Total	**37,500**
	11,000*
Alaska	
Atlantic Richfield Co., North Slope	20,000
Chevron U.S.A., Kenai	22,000
North Pole Refining Co., North Pole (Formerly Earth Resources Co.)	45,000
Tesoro Petroleum Corp., Kenai	48,500
Total	**135,500**
Arizona	
Arizona Fuel Corp., Fredonia	6,000
Arkansas	
Cross Oil & Refining Co., Smackover	6,700
	2,700*
Crystal Oil Co., Stephens (Formerly Berry Petroleum Co.)	3,200
MacMillan Ring-Free Oil Co., Norphlet	4,600
	1,280*
Tosco Corp., El Dorado	38,500
	8,500*
Total	**53,000**
	12,480*
California	
Anchor Refining Co., McKittrick	9,000*
Atlantic Richfield Co., Carson	178,000
	27,000*
Beacon Oil Co., Hanford (Formerly American Ultramar Ltd.)	17,300
Champlin Petroleum Co., Wilmington	60,000
Chevron U.S.A., Bakersfield	26,000
El Segundo	390,000
	15,000*
Richmond	294,000
	71,000*
Conoco, Santa Maria	9,500
Demenno-Kerdoon, Compton	10,000
ECO Petroleum, Long Beach	0
Edgington Oil Co., Long Beach	41,600
Exxon Co. U.S.A., Benicia	106,000
Fletcher Oil & Refining Co., Carson	29,500
Getty Refining & Marketing Co., Bakersfield	38,000
	19,600*
Golden Eagle Refining Co., Carson	16,170
Gulf Oil Corp., Santa Fe Springs	51,500
Huntway Refining Co. of Northern California, Van Nuys	6,750
Huntway Refining Co., Wilmington	4,750
Independent Valley Energy Co., Bakersfield	27,000
Kern Oil & Refinery Co., Bakersfield (Formerly Kern County Refinery)	21,400
Lunday-Thagard Oil Co., South Gate	3,700
MacMillan Ring-Free Oil Co., Long Beach	11,000
Marlex Oil & Refining, Long Beach	21,100
Mobil Oil Corp., Torrance	123,500
Newhall Refining Co. Inc., Newhall	21,400
Oxnard Refinery, Oxnard	4,000
Pacific Oasis Corp., Paramount (Formerly Conoco Inc.)	26,000
	14,500*
Pacific Refining Co., Hercules	85,000
Powerine Oil Co., Santa Fe Springs	44,120
San Joaquin Refining Co., Bakersfield	10,000
Shell Oil Co., Martinez	91,400
Wilmington	93,000
Sunland Refining Corp., Bakersfield	12,000
Texaco Inc., Wilmington	60,000
	15,000*
Tosco Corp., Avon	126,000
Bakersfield	38,800
Union Oil Co. of California, Arroyo Grande	41,000
Rodeo	70,000
Wilmington	86,500
	21,500*
U.S.A. Petrochem Corp., Ventura	24,000
Witco Chemical Corp., Oildale	0
Total	**2,319,990**
	192,600*
Colorado	
Asamera Oil (U.S.), Commerce City	26,000
Conoco, Commerce City	32,500
Gary Western Co., Fruita (Formerly Gary Refining Co.)	13,100
Total	**71,600**
Delaware	
Getty Refining & Marketing Co., Delaware City	140,000
Georgia	
Amoco Oil Co., Savannah	24,000
Young Refining Corp., Douglasville	2,700
Total	**26,700**
Hawaii	
Chevron U.S.A., Honolulu	48,000
Illinois	
Clark Oil & Refining Corp., Blue Island	57,000
Hartford	47,500
Marathon Oil Co., Robinson	120,000
	75,000*
Mobil Oil Corp., Joliet	180,000
Moreco Energy, McCook	1,000
Shell Oil Co., Wood River	283,000
Texaco, Lawrenceville	54,000
	30,000*
Union Oil Co. of California Lemont	151,000
Total	**893,500**
	105,000*
Indiana	
Amoco Oil Co., Whiting	376,000
Gladieux Refinery, Fort Wayne	12,900
Indiana Farm Bureau Cooperative Association, Mount Vernon	21,200
Kentucky Oil & Refining Co., Troy	1,000*
Laketon Refining Corp., Laketon (Formerly Laketon Asphalt Refining Co.)	7,900
Rock Island Refining Corp., Indianapolis	43,200
Total	**461,200**
	1,000*
Kansas	
Derby Refining Co., North Wichita	27,982
Farmland Industries, Coffeyville (Formerly CRA Inc.)	56,500
Phillipsburg	26,400*
Getty Refining & Marketing Co., El Dorado	80,577
Mobil Oil Corp., Augusta	31,200
	18,800*
National Cooperative Refinery Assn., McPherson	54,000
Pester Refining Co., El Dorado	33,250
Total Petroleum, Arkansas City	42,500
Total	**326,009**
	45,200*
Kentucky	
Ashland Oil, Catlettsburg	189,150
	24,250*
Louisville	25,200
B-T Energy Corp., Louisville	3,000
Kentucky Oil & Refining Co., Betsy Lane	600*
Somerset Refinery Inc., Somerset	5,500
Total	**222,850**
	24,850*
Louisiana: Gulf	
Canal Refining Co., Church Point	8,000
Celeron Oil & Gas Co., Mermentau (Formerly Slapco)	11,000
Cities Service Co., Lake Charles	297,000
	23,000*
Clark Oil & Refining Corp., Mt. Airy (Formerly Mt. Airy Refining Co.)	0
Conoco, Egan	1,500
	5,000*
West Lake	156,500
CPI Oil & Refining, Lake Charles	14,000
Exxon Co. U.S.A., Baton Rouge	419,000
	36,000*
GHR Energy Corp., Good Hope	300,000*
Gulf Oil Corp., Belle Chasse	199,100

Company	b/d
Hill Petroleum Co., Krotz Springs	46,000
	11,400*
International Processors, St. Rose	28,356*
Mallard Resources, Gueydan	7,400
Marathon Oil Co., Garyville	255,000
McTan Refining Corp., St. James	19,300*
Murphy Oil Corp., Meraux	90,200
Placid Refining Co., Port Allen	45,000
Shell Oil Co., Norco	218,200
Tenneco Oil Co., Chalmette	114,000
Texaco, Convent	140,000
Texas NAPCO, St. James (Formerly LaJet Inc.)	20,000
Total	**2,041,900**
	423,056*
Louisiana: Inland	
Atlas Processing Co., Shreveport	45,000
	31,500*
Calumet Refining Co., Princeton	3,200
	1,200*
Claiborne Gasoline Co., Lisbon	6,500
Kerr-McGee Corp., Cotton Valley (Formerly Cotton Valley Solvents Co.)	7,800
Dubach	7,800
Port Petroleum Inc., Stonewall	3,200
Total	**73,500**
	32,700*
Maryland	
Chevron U.S.A., Baltimore	14,200
Michigan	
Crystal Refining Co., Carson City	3,000
Lakeside Refining Co., Kalamazoo	2,700
Marathon Oil Co., Detroit	68,500
Total Petroleum, Alma	40,000
Total	**114,200**
Minnesota	
Ashland Oil, St. Paul Park	67,143
Koch Refining Co., Rosemount	133,000
Total	**200,143**
Mississippi: Gulf	
Chevron U.S.A., Pascagoula	280,000
Mississippi: Inland	
Amerada Hess Corp., Purvis	29,000
Ergon Refining, Vicksburg	20,600*
Southland Oil Co., Lumberton	3,000
	2,800*
Sandersville	11,000
Vicksburg Refining, Vicksburg	7,900*
Total	**43,000**
	31,300*
Montana	
Conoco, Billings	48,500
Exxon Co. U.S.A., Billings	45,000
Farmers Union Central Exchange Inc. (CENEX), Laurel	33,650
	7,800*
Flying J, Cutbank	5,600
Kenco Refining, Wolf Point	4,700
Simmons Refining Corp., Great Falls	6,300
Total	**143,750**
	7,800*
Nevada	
Nevada Refining Co., Tonopah	4,500
New Jersey	
Amerada Hess Corp., Port Reading	68,000*

Company	b/d
Chevron U.S.A., Perth Amboy	80,000
	88,000*
Exxon Co. U.S.A., Linden	100,000
Mobil Oil Corp., Paulsboro	99,700
Seaview Petroleum Co., Paulsboro	44,400
Texaco Inc., Westville	90,000
Total	**414,100**
	156,000*
New Mexico	
Giant Industries Inc., Gallop (Formerly Shell Oil Co.)	18,000
Navajo Refining Co., Artesia	28,500
Plateau, Bloomfield	16,800
Southern Union Refining Co., Lovington	36,100
Thriftway Oil Co., Bloomfield	4,750
Total	**104,150**
New York: East	
Cibro Petroleum Products, Albany	41,850
New York: West	
Ashland Oil, Buffalo	64,000*
North Carolina	
GNC Energy Corp., Greensboro	3,000
North Dakota	
Amoco Oil Co., Mandan	56,000
Ohio: East	
Ashland Oil, Canton	66,000
Ohio: West	
Ashland Oil, Findlay	20,400*
Gulf Oil Corp., Cleves	43,700
Standard Oil Co. of Ohio, Lima	168,000
Toledo	80,000
	40,000*
Sun Co., Toledo	118,000
Total	409,700
	60,400*
Oklahoma	
Allied Materials Corp., Stroud	7,500
Champlin Petroleum Co., Enid	53,800
Conoco, Ponca City	118,500
	15,500*
Hudson Refining Co., Cushing	19,000*
Kerr-McGee Corp., Wynnewood	43,000
Oklahoma Refining Co., Cyril	9,200
Thomas	9,800
Sun Co., Tulsa	85,000
Tonkawa Refining Co., Arnett	12,000
Tosca Corp., Duncan	47,000
Total Petroleum, Ardmore	49,500
	12,500*
Total	**435,300**
	47,000*
Oregon	
Chevron U.S.A., Willbridge	15,000
Pennsylvania: East	
Atlantic Richfield Co., Philadelphia	125,000
BP Oil Corp., Marcus Hook	168,000
Gulf Oil Corp., Philadelphia	174,100
Sun Co., Marcus Hook	155,000
Total	**622,100**
Pennsylvania: West	
American Refining Group, Indianola	200*
Ashland Oil, Freedom	6,800
Pennzoil Co., Rouseville	15,700

Company	b/d
Quaker State Oil Refining Corp., Emlenton	0
Smethport	6,700
United Refining Co., Warren (Formerly Coral Petroleum Inc.)	60,000
Witco Chemical Corp., Bradford	6,841
Total	**96,041**
	200*
Tennessee	
Delta Refining Co., Memphis	49,500
Texas: Gulf	
American Petrofina Co. of Texas, Port Arthur	90,000
Amoco Oil Co., Texas City	415,000
Atlantic Richfield Co., Houston	232,000
Champlin Petroleum Co., Corpus Christi	155,000
	15,000*
Charter International Oil Co., Houston	65,000
Coastal States Petroleum Co., Corpus Christi	110,400
	18,400*
Conoco, Alvin Texas City	33,274
Crown Central Petroleum Corp., Pasadena	100,000
Eddy Refining Co., Houston	3,250
Erickson Refining Corp., Port Neches (Formerly Independent Refining Corp.)	30,000*
Exxon Co. U.S.A., Baytown	427,000
	67,000*
Gulf Oil Corp., Port Arthur	268,400
	144,300*
Independent Refining Corp., Winnie	50,000*
Koch Refining Co., Corpus Christi (Merged with Gulf States Oil & Refining Co.)	105,000
Marathon Oil Co., Texas City	49,000
	20,500*
Mobil Oil Corp., Beaumont	277,400
	57,600*
Petraco-Valley Oil & Refining Co., Brownsville	12,300*
Petromax, Houston	2,000*
Phillips Petroleum Co., Sweeney	175,000
Quintana Petrochemical Co., Corpus Christi	33,300
Saber Refining Co., Corpus Christi	19,320*
Shell Oil Co., Deer Park	285,000
South Hampton Refining Co., Silsbee	18,100
Southwestern Refining Co., Corpus Christi	63,000
	41,000*
Texaco, Port Arthur	242,000
	160,000*
Port Neches	31,000
Texas City Refining, Texas City	119,600
Uni Refining, Ingleside, (Formerly Texas Independent Corp.)	30,000*
Union Oil Co. of California, Beaumont (Nederland)	120,000
Total	**3,417,724**
	667,420*
Texas: Inland	
Amber Refining, Fort Worth (Formerly E-Z Serv Refining)	20,000
American Petrofina Co. of Texas, Big Spring	60,000
Chevron U.S.A., El Paso	76,000
Diamond Shamrock Corp., Sunray	71,100
Dorchester Refining Co., Mount Pleasant	26,500
White Deer	0
Flint Chemical Co., San Antonio	1,500
Howell Hydrocarbons, San Antonio	9,900

Company	b/d
La Gloria Oil & Gas Co., Tyler	46,000
Liquid Energy Corp., Bridgeport	10,000
Petrolite Corp., Kilgore	1,000
Phillips Petroleum Co., Borger	95,000
Pioneer Refining Ltd., Nixon	15,000
Pride Refining Inc., Abilene	42,750
Shell Oil Co., Odessa	30,600
Shore, Kilgore	550
Sigmor Refining Co., Three Rivers	40,000
Tesoro Petroleum Corp., Carrizo Springs	26,100
Texaco, Amarillo	20,000
El Paso	17,000
Thriftway Oil Co., Graham	1,184*
Total	**609,000** **1,184***
Utah	
Amoco Oil Co., Salt Lake City	39,000
Caribou-Four Corners Oil Co., Woods Cross	8,000*
Chevron U.S.A., Salt Lake City	45,000
Crysen Corp., Woods Cross (Formerly Western Refining Co.)	12,500
Husky Oil Co., North Salt Lake	25,000
Morrison Petroleum Co., Woods Cross	6,000*
Phillips Petroleum Co., Woods Cross	25,000
Plateau, Roosevelt	7,500
Total	**154,000** **14,000***
Virginia	
Amoco Oil Co., Yorktown	53,000
Washington	
Atlantic Richfield Co., Ferndale	126,000
Chevron U.S.A., Richmond Beach	5,500
Mobil Oil Corp., Ferndale	71,500
Shell Oil Co., Anacortes	91,000
Sound Refining, Tacoma (Formerly Crysen Corp.)	11,070
Texaco, Anacortes	78,000
U.S. Oil & Refining Co., Tacoma	21,400
Total	**404,470**
West Virginia	
Quaker State Oil Refining Corp., Newell	9,515
St. Mary's	4,500
Total	**14,015**
Wisconsin	
Murphy Oil Corp., Superior	39,000
Wyoming	
Amoco Oil Co., Casper	48,000
Husky Oil Co., Cheyenne	28,800
Little America Refining Co., Casper	24,500
Mountaineer Refining Co., La Barge	200
Silver Eagle Oil Inc., La Barge	1,500*
Sinclair Oil Corp., Sinclair (Formerly Little America Refining Co.)	54,000
Wyoming Refining Co., Newcastle	12,555
Total	**168,055** **1,500***
Guam	
Guam Oil & Refining Co., Agana	43,900
Puerto Rico	
Commonwealth Oil Refining Co., Penuelas	123,495*
Gulf Oil Corp., Bayamon	24,500 11,500*
Phillips Puerto Rico Core, Guayama	0
Sun Co., Yabucoa	85,000
Total	**109,500** **134,995***
Hawaiian Foreign Trade Zone	
Hawaiian Independent Refinery, Ewa Beach	60,000
Virgin Islands	
Amerada Hess Corp., St. Croix	515,000

Source: Petroleum Supply Annual, 1983, Energy Information Administration

Lubricating Oil and Wax Capacities of U.S. Refineries

(All capacities in 000 b/d in 1983)

			Finished Lube Capacity					Wax Capacity	
Company	Location	Crude Capacity	A	B	C	D	Total	E	F
Allied Materials Corp.	Stroud, Okla.	8.0	0.8				0.8		0.2
Amoco Oil Co.	Casper, Wyo.	48.0	1.5		0.1		1.6	0.2	0.2
Amoco Oil Co.	Whiting, Ind.	376.0	6.2				6.2	0.6	
Ashland Oil, Inc.	Catlettsburg, Ky.	220.0	7.9				7.9		2.0
Ashland Oil, Inc.	Freedom, Pa.	6.5							
Atlantic Richfield Co.	houston, Tex.	232.0	4.4			2.0	6.4	0.4	0.4
Calumet Refining Co.	Burnham, Ill.	0.0				0.6	0.6		
Calumet Refining Co.	Princeton, La.	4.4				3.2	3.2		
Chevron U.S.A. Inc.	Richmond, Calif.	365.0	3.0	2.3			5.3	1.2	1.0
Cit-Con Oil Corp.	Lake Charles, La.		10.0				10.0	1.0	0.8
Conoco Inc.	Ponca City, Okla.	134.0	2.0				2.0	0.2	
Cross Oil & Refining, Inc.	Smackover, Ark.	9.8				4.0	4.0		
Diamond Shamrock Corp.	Three Rivers, Tex.	2.0				2.0	2.0		
Exxon Co., U.S.A.	Baton Rouge, La.	455.0	13.8		2.7		16.5	1.5	
Exxon Co., U.S.A.	Baytown, Tex.	494.0	16.1	9.0		6.7	31.8		1.7
Farmland Industries, Inc.	Coffeyville, Kans.	56.5	2.5				2.5	0.2	
Gulf Refining and Marketing Co.	Port Arthur, Tex.	412.7	6.6	0.5	1.4	1.6	10.1		0.4
Lubrication Co. of America	Saugus, Calif.			0.5			0.5		
Macmillan Petroleum, Inc.	Norphlet, Ark.	6.0				2.2	2.2		
Mobil Oil Corp.	Beaumont, Tex.	325.0	9.2				9.2	1.3	0.3
Mobil Oil Corp.	Paulsboro, N.J.	99.7	7.1				7.1		0.3
Pennzoil Co.	Falling Rock, W. Va.	0.0			0.0		0.0	0.0	0.0
Pennzoil Co.	Rouseville, Pa.	15.7			1.4		4.4	0.6	0.4
Pennzoil Co., Atlas Processing Co.	Shreveport, La.	76.5	3.6		1.4	2.7	7.7	1.0	
Petrolite Corp.	Barnsdall, Okla.							0.4	
Petrolite Corp., Bareco Div.	Kilgore, Tex.	1.0							0.3
Phillips Petroleum Co.	Kansas City, Kans.	0.0	0.0				0.0		0.0
Quaker State Oil Ref. Corp.	Emlenton, Pa.							0.7	
Quaker State Oil Ref. Corp.	Farmers Valley, Pa.	6.5	2.5				2.5	0.4	0.5
Quaker State Ref. Corp.	Newell, W. Va.	11.7			3.6		3.6		0.8
Quaker State Oil Ref. Corp.	St. Mary's, W. Va.	4.9	1.6				1.6		0.3
Shell Oil Co.	Deer Park, Tex.	285.0	4.5			4.4	8.9	1.2	
Shell Oil Co.	Martinez, Calif.	91.4		3.5		0.3	3.8		
Shell Oil Co.	Wood River, Ill.	283.0	5.0				5.0		0.7
Standard Oil Co. (Ohio)	Lima, Ohio	168.0	2.0		0.4		2.4		
Sun Co., Inc.	Marcus Hook, Pa.	155.0	5.5			10.5	16.0	1.0	
Sun Co., Inc.	Tulsa, Okla.	85.0	7.8				7.8	0.8	
Sun Co., Inc.	Yabucoa, Puerto Rico	85.0	6.5				6.5		1.7
Texaco U.S.A.	Port Arthur, Tex.	402.0	12.0	0.6	3.4	4.0	20.0	0.1	1.8
Union Oil Co. of Calif.	Nederland, Tex.	120.0	2.9				2.9	0.1	0.2
Union Oil Co. of Calif.	Rodeo, Calif.	70.0	4.0				4.0	0.6	1.5
Witco Chemical Corp.	Bradford, Pa.	7.6	1.6		0.9		2.5	0.2	
Witco Chemical Corp.	Oildale, Calif.	11.0		2.4		1.9	4.3		
	TOTAL:	5133.9	150.6	18.8	18.3	46.1	233.8	13.7	15.5

Canadian Refineries

Gulf Canada Ltd.	Clarkson, Ontario	76.6	4.6				4.6		1.0
Imperial Oil Enterprises Ltd.	Sarnia, Ontario	126.0	5.1	0.7			5.8	0.6	1.6
Imperial Oil Enterprises Ltd.	Strathcona, Alberta	150.0	2.9		-		2.9		1.1
International Waxes, Ltd.	Agincourt, Ontario							0.8	
Shell Canada Ltd.	Montreal East, Quebec	31.0	3.4				3.4		1.0
	TOTAL:	383.6	16.0	0.7	0.0	0.0	16.7	1.4	4.7

Definitions: A—Solvent extracted paraffinic stocks; B—Solvent extracted naphthenic stocks; C—Unextracted paraffinic stocks; D—Unextracted naphthenic stocks; E—Fully refined, crude scale and micro waxes; F—Semi-finished, slack waxes and petrolatums.

Source: National Petroleum Refiners Assn., Lubricating Oil and Wax Capacities, 1983

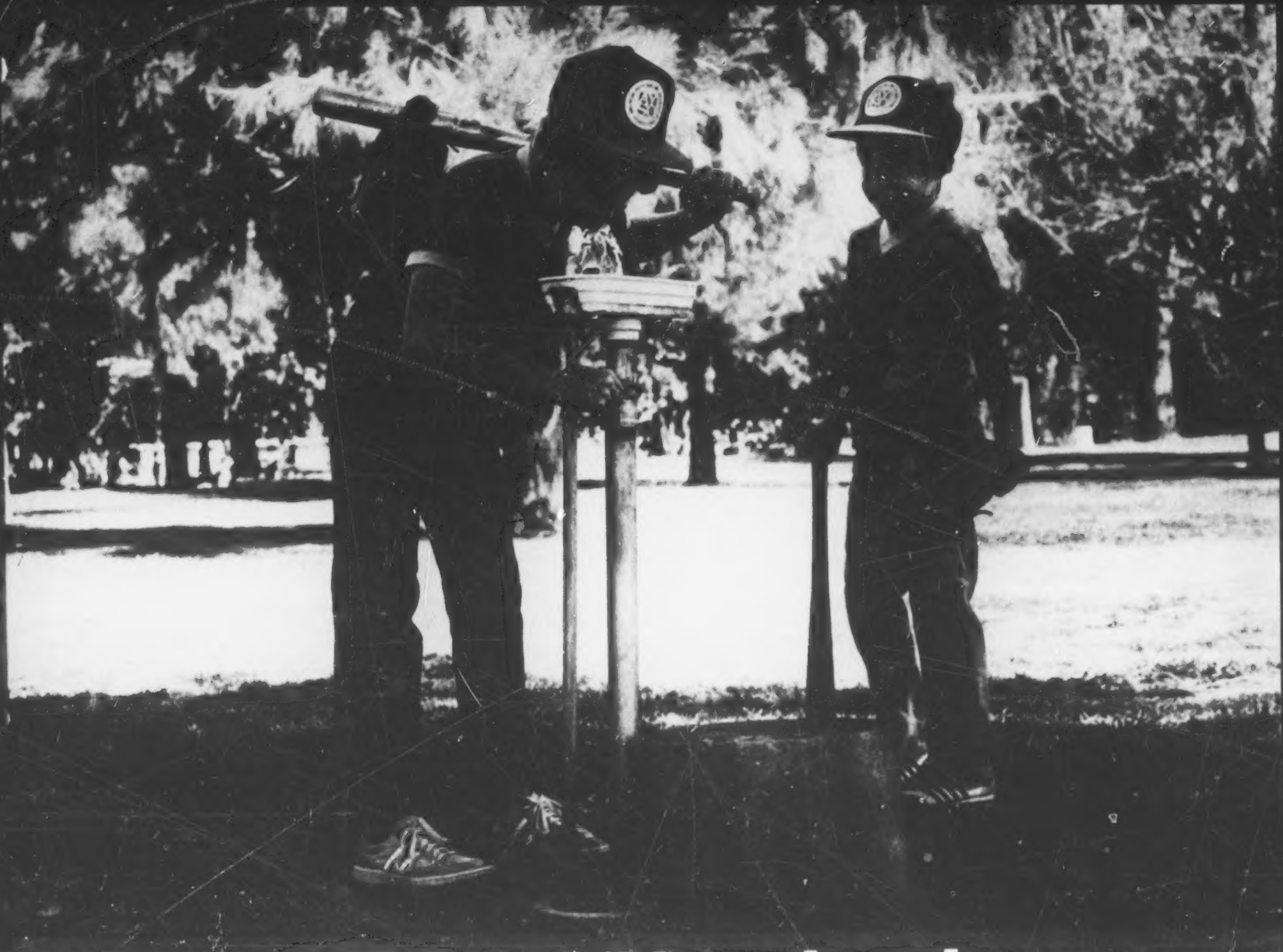
U.S. Refineries and Capacities by Companies

(In descending order as of Jan. 1, 1983)

Important note: This listing includes capacity that is operation and capacity that is idle or shut down. In the latter case, this capacity can be restored to normal within 90 days. The Energy Information Administration says there were 258 operable refineries on Jan. 1, 1983, compared with a total of 301 the preceding year. The crude distillation capacity was 16.9-million b/d, compared with the year ago figure of 17.9-million b/d. Of the operable capacity, 1.9-million b/d was idle. EIA's forecast for Jan. 1, 1984 indicated at least seven more refineries would be shut down in 1983 with an aggregate loss of 400,000 b/d. For earlier data, see 1983 NPN Factbook.

Companies with a capacity of more than 100,000 b/d. Number of companies: 30; Total capacity: 14,185,476.

Company	b/d
Standard Oil Co. of California	
Chevron U.S.A.	
El Segundo, CA	405,000
Richmond, CA	365,000
Pascagoula, MS	280,000
Perth Amboy, NJ	168,000
El Paso, TX	76,000
Honolulu, HI	48,000
Salt Lake City, UT	45,000
Bakersfield, CA	26,000
Kenai, AK	22,000
Willbridge, OR	15,000
Baltimore, MD	14,200
Richmond Beach, WA	5,500
Total	1,469,700
Exxon Corp.	
Exxon Co. U.S.A.	
Baytown, TX	494,000
Baton Rouge, LA	455,000
Benicia, CA	106,000
Linden, NJ	100,000
Billings, MT	45,000
Total	1,200,000
Shell Oil Co.	
Deer Park, TX	285,000
Wood River, IL	283,000
Norco, LA	218,200
Wilmington, CA	93,000
Martinez, CA	91,400
Anacortes, WA	91,000
Odessa, TX	30,600
Total	1,092,200
Standard Oil Co. of Indiana	
Amoco Oil Co.	
Texas City, TX	415,000
Whiting, IN	376,000
Mandan, ND	56,000
Yorktown, VA	53,000
Casper, WY	48,000
Salt Lake City, UT	39,000
Savannah, GA	24,000
Total	1,011,000
Texaco Inc.	
Port Arthur, TX	402,000
Convent, LA	140,000
Westville, NJ	90,000
Lawrenceville, IL	84,000
Anacortes, WA	78,000
Wilmington, CA	75,000
Port Neches, TX	31,000
Amarillo, TX	20,000
El Paso, TX	17,000
Total	937,000
Gulf Oil Corp.	
Port Arthur, TX	412,700
Belle Chasse, LA	199,100
Philadelphia, PA	174,100
Santa Fe Springs, CA	51,500
Cleves, OH	43,700
Total	881,100
Mobil Oil Corp.	
Beaumont, TX	335,000
Joliet, IL	180,000
Torrance, CA	123,500
Paulsboro, NJ	99,700
Ferndale, WA	71,500
Augusta, KS	50,000
Total	859,700
Atlantic Richfield Co.	
Houston, TX	232,000
Carson, CA	205,000
Ferndale, WA	126,000
Philadelphia, PA	125,000
North Slope, AK	20,000
Total	708,000
Marathon Oil Co.	
Garyville, LA	255,000
Robinson, IL	195,000
Texas City, TX	69,500
Detroit, MI	68,500
Total	588,000
Union Oil Co. of California	
Lemont, IL	151,000
Beaumont (Nederland), TX	120,000
Wilmington, CA	108,000
Rodeo, CA	70,000
Arroyo Grande, CA	41,000
Total	490,000
Ashland Oil	
Catlettsburg, KY	213,400
St. Paul Park, MN	67,143
Canton, OH	66,000
Buffalo, NY	64,000
Louisville, KY	25,200
Findlay, OH	20,400
Freedom, PA	6,800
Total	462,943
Standard Oil Co. of Ohio	
Lima, OH	168,000
Toledo, OH	120,000
BP Oil Corp.	
Marcus Hook, PA	168,000
Total	456,000
DuPont Holdings	
Conoco, Inc.	
West Lake, LA	156,500
Ponca City, OK	134,000
Billings, MT	48,500
Alvin Texas City, TX	33,274
Commerce City, CO	32,500
Santa Maria, CA	9,500
Egan, LA	6,500
Total	420,774
Sun Co.	
Marcus Hook, PA	155,000
Toledo, OH	118,000
Tulsa, OK	85,000
Total	358,000
Occidental Petroleum	
Cities Service Co.	
Lake Charles, LA	320,000
GHR Energy Corp.	
Good Hope, LA	300,000
Phillips Petroleum Co.	
Sweeny, TX	175,000
Borger, TX	95,000
Woods Cross, UT	25,000
Total	295,000
Union Pacific Corp.	
Champlin Petroleum Co.	
Corpus Christi, TX	170,000
Wilmington, CA	60,000
Enid, OK	53,800
Total	283,800
Getty Oil Co.	
Getty Refining & Marketing Co.	
Delaware City, DE	140,000
El Dorado, KS	80,577
Bakersfield, CA	57,600
Total	278,177
Tosco Corp.	
Avon, California	126,000
El Dorado, AR	47,000
Duncan, OK	47,000
Bakersfield, CA	38,800
Total	258,800
Coastal States Marketing Corp.[1]	
Coastal States Petroleum Co.	
Corpus Christi, TX	128,800
Pacific Refining Co. Inc.	
Hercules, CA	85,000
Derby Refining Co.	
North Wichita, KS	27,982
Total	241,782
Koch Industries	
Koch Refining Co.	
Rosemount, MN	133,000
Corpus Christi, TX[2]	105,000
Total	238,000
Kerr-McGee Corp.	
Wynnewood, OK	43,000
Dubach, LA	7,800
Cotton Valley, LA[1]	7,800
Southwestern Refining Co. Inc.	
Corpus Christi, TX	104,000
Total	162,600
American Petrofina Co. of Texas	
Port Arthur, TX	90,000
Big Spring, TX	60,000
Total	150,000
Total Petroleum Inc.	
Ardmore, OK	62,000
Arkansas City, KS	42,500
Alma, MI	40,000
Total	144,500



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The future of our underground water supply, and environment, depend in large part on the decisions you as a specifier make today.

Recent case histories involving underground tanks point to the dangers from petroleum and hazardous chemical leaks, which have resulted in contamination of the water supplies of entire communities. Fiberglass tanks have suffered both from structural and internal corrosion-related failures. And in aggressive soil environments, bare-steel tanks can fail prematurely.

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Fortunately today there is an environmentally-sound choice: sti-P_3*–with a superior record over any other product.

Combining steel's intrinsic strength and structural integrity with proven three-way protection against corrosion, *plus* a proven compatibility with all liquid fuels, as well as many other chemical substances, the sti-P_3* system has the *best no-leak record of any nationally available tank*–with approximately 20,000 installations since 1969.

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Company	b/d
Murphy Oil Corp.	
Meraux, LA	90,200
Superior, WI	39,000
Total	129,200
Agway Petroleum Corp.	
Texas City Refining Inc.	
Texas City, TX	119,600
Tenneco Oil Co.	
Chalmette, LA	114,000
Diamond Shamrock Corp.	
Sunray, TX	71,100
Sigmor Refining Co.	
Three Rivers, TX	40,000
Total	111,100
Apex Oil Co.	
Clark Oil & Refining Corp.	
Blue Island, IL	57,000
Hartford, IL	47,500
Total	104,500

Companies with a capacity of 30,001 to 100,000 b/d. Number of companies: 28; Total capacity: 1,646,420.

Company	b/d
Crown Central Petroleum Corp.	
Pasadena, TX	100,000
Amerada Hess Corp.	
Port Reading, NJ[4]	68,000
Purvis, MS	29,000
Total	97,000
Mid-America Pipe Line System[5]	
Delta Refining Co.	
Memphis, TN	49,500
North Pole Refining Co.	
North Pole, AK	45,000
Total	94,500
Pennzoil Co. Inc.	
Rouseville, PA	15,700
Atlas Processing Co.	
Shreveport, LA	76,500
Total	92,200
Farmland Industries Inc.[6]	
Coffeyville, KS	56,500
Phillipsburg, KS	26,400
Total	82,900
Independent Refining Corp.	
Winnie, TX	50,000
Erickson Refining Corp.[7]	
Port Neches, TX	30,000
Total	80,000
Louisiana Land & Exploration Co.	
Mobile, AL	80,000
Little America Refining Co.	
Casper, WY	24,500
Sinclair Oil Corp.[8]	
Sinclair, WY	54,000
Total	78,500
Tesoro Petroleum Corp.	
Kenai, AK[9]	48,500
Carrizo Springs, TX	26,100
Total	74,600
Coral Petroleum Inc.	
United Refining Co.[10]	
Warren, PA	60,000
Vulcan Refining Co.[11]	
Tuscaloosa, AL	9,500
Total	69,500
Charter International Oil Co.	
Houston, TX	65,000
Goldking Refining Ltd.	
Hill Petroleum Co.	
Krotz Springs, LA	57,400
National Cooperative Refinery Association	
McPherson, KS	54,000
Husky Oil Co.	
Cheyenne, WY	28,800
North Salt Lake, UT	25,000
Total	53,800
Texas Eastern Transmission Corp.	
La Gloria Oil & Gas Co.	
Tyler, TX	46,000
Placid Oil Co.	
Placid Refining Co.	
Port Allen, LA	45,000
Seaview Petroleum Co.	
Paulsboro, NJ	44,400
Powerine Oil Co.	
Santa Fe Springs, CA	44,120
Rock Island Refining Corp.	
Indianapolis, IN	43,200
Pride Refining Inc.	
Abilene, TX	42,750
Cirillo Brothers Oil Co.	
Cibro Petroleum Products Inc.	
Albany, NY	41,850
Penn Central Corp.	
Edgington Oil Co. Inc.	
Long Beach, CA	41,600
Farmers Union Central Exchange Inc. (CENEX)	
Laurel, MT	41,450
Pacific Oasis Corp.[12]	
Paramount, CA	40,500
Southern Union Co.	
Southern Union Refining Co.	
Lovington, NM	36,100
Hunt Oil Co.	
Tuscaloosa, AL	33,500
Quintana Petrochemical Co.	
Corpus Christi, TX	33,300
Pester Corp.	
Pester Refining Co.	
El Dorado, KS	33,250

Companies with a capacity of 10,001 to 30,000 b/d. Number of companies: 40; Total capacity: 801,866.

Company	b/d
Texas Independent Corp.	
Uni Refining Inc.[13]	
Ingleside, TX	30,000
Fletcher Oil & Refining Co.	
Carson, CA	29,500
Holly Corp.	
Navajo Refining Co.	
Artesia, NM	28,500
International Processors	
St. Rose, LA	28,356
Semarck California Inc.	
Independent Valley Energy Co.	
Bakersfield, CA	27,000
Mobile Bay Refining Co.	
Chickasaw, AL	26,600
Dorchester Gas Corp.	
Dorchester Refining Co.	
Mount Pleasant, TX	26,500
Asamera Oil (U.S.) Inc.	
Commerce City, CO	26,000
Marion Corp.	
Theodore, AL	25,000
Suburban Propane Gas Corp. Plateau Inc.	
Bloomfield, NM	16,800
Roosevelt, UT	7,500
Total	24,300
U.S.A. Petrochem Corp.	
Ventura, CA	24,000
Crysen Corp.	
Woods Cross, UT[14]	12,500
Sound Refining Inc.	
Tacoma, WA	11,070
Total	23,570
Kern Oil & Refinery Co.[15]	
Bakersfield, CA	21,400
Pauley Petroleum	
Newhall Refining Co. Inc.	
Newhall, CA	21,400
Time Oil Co.	
U.S. Oil & Refining Co.	
Tacoma, WA	21,400
Indiana Farm Bureau Cooperative Association	
Mount Vernon, IN	21,200
Marlex Petroleum Inc.	
Marlex Oil & Refining Inc.	
Long Beach, CA	21,100
Quaker State Oil Refining Corp.	
Newell, WV	9,515
Smethport, PA	6,700
St. Mary's, WV	4,500
Total	20,715
Ergon Refining Inc.	
Vicksburg, MS	20,600
E-Z Serv Inc.	
Amber Refining Inc.[16]	
Fort Worth, TX	20,000
Texas NAPCO Inc.[17]	
St. James, LA	20,000
Saber Energy Inc.	
Saber Refining Co.	
Corpus Christi, TX	19,320
McTan Refining Corp.	
St. James, LA	19,300
Hudson Oil Co. Inc.	
Hudson Refining Co. Inc.	
Cushing, OK	19,000
Oklahoma Refining Co.	
Thomas, OK	9,800
Cyril, OK	9,200
Total	19,000

Universel®

REMANUFACTURED PUMPS WITH THE

Electronic Computer

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000.00
TOTAL SALE
2.519
2.519
000.00
TOTAL SALE
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GALLONS
000.00
GALLONS

Shown with ECON-O-REEL Retriever with 3/4 x 3/4 x 20' Hose.

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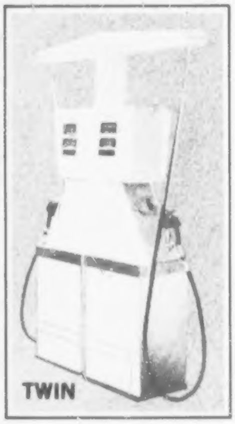
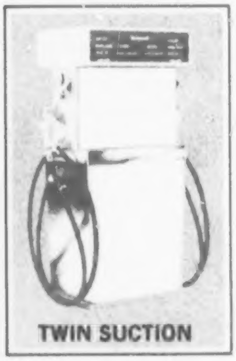

TWIN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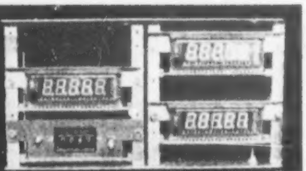
UNIQUE non-volatile memory circuit can retain data up to 8 years without any type of electrical backup. Fail-safe circuit design triggers all data from operating memory into non-volatile memory when power fails. When power returns circuit transfers data back to the operating memory and pump continues normal function.



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Complete bezel assembly removal is simplified for easy access to computer for manual price change or service. All electronic components are completely assessible. Utilizes new type electronic vacuum-fluorescent read-out that is easily readable in bright light. Can price up to $9.999 per gallon. Remote price change capability.

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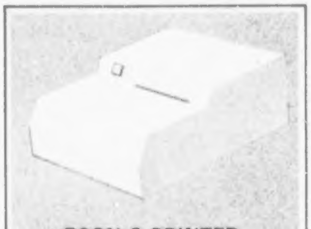
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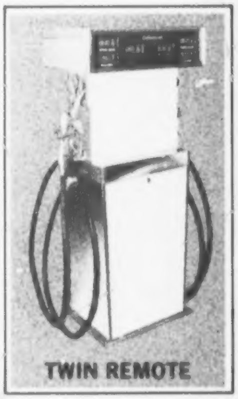
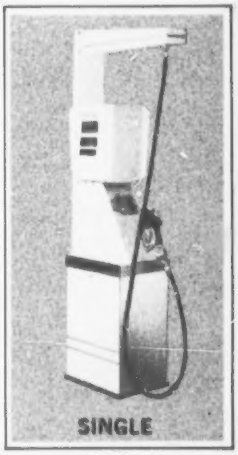
The only parts used from the old pump are the used internal components such as shown here. These are not components that have just been "repaired." They have been rebuilt all the way through... completely torn down, and all parts meticulously cleaned, worn parts replaced.


TWIN REMOTE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Company	b/d
Texas Oil & Chemical Co.	
South Hampton Refining Co.	
Silsbee, TX	18,100
Giant Industries Inc.[18]	
Gallup, NM	18,000
American Ultramar Ltd.	
Beacon Oil Co.[19]	
Hanford, CA	17,300
MacMillan Ring-Free Oil Co. Inc.	
Long Beach, CA	11,000
Norphlet, AK	5,880
Total	16,880
V G S Corp.	
Southland Oil Co.	
Sandersville, MS	11,000
Lumberton, MS	5,800
Total	16,800
Ultramar Co. Ltd.	
Golden Eagle Refining Co. Inc.	
Carson, CA	16,170
Tomlinson Refining Inc.	
Pioneer Refining Ltd.	
Nixon, TX	15,000
CPI Oil & Refining Inc.	
Lake Charles, LA	14,000
Gary Energy Co.	
Gary Western Co.[20]	
Fruita, CO	13,100
Gladieux Refinery Inc.	
Fort Wayne, IN	12,900
Hermes Products Co.	
Wyoming Refining Co.	
Newcastle, WY	12,555
Petraco-Valley Oil & Refining Co.	
Brownsville, TX	12,300
Tonkawa Refining Co.	
Arnett, OK	12,000
World Oil Co.	
Sunland Refining Corp.	
Bakersfield, CA	12,000
Celeron Oil & Gas Co.[21]	
Mermentau, LA	11,000

Companies with a capacity of 10,000 b/d or less. Number of companies: 44; Total capacity: 225,575.

Company	b/d
Demenno-Kerdoon	
Compton, CA	10,000
Mitchell Energy Corp.[22]	
Liquid Energy Corp.	
Bridgeport, TX	10,000
San Joaquin Refining Co.	
Bakersfield, CA	10,000
Howell Corp.	
Howell Hydrocarbons Inc.	
San Antonio, TX	9,900
Moore & Munger Inc.	
Cross Oil & Refining Co.[23]	
Smackover, AR	9,400
Sierra Anchor Sierra Energy Association	
Anchor Refining Co. Inc.	
McKittrick, CA	9,000
Canal Refining Co.	
Church Point, LA	8,000
Caribou-Four Corners Oil Co.	
Woods Cross, UT	8,000
Laketon Refining Corp.[24]	
Laketon, IN	7,900
Vicksburg Refining Inc.	
Vicksburg, MS	7,900
Allied Materials Corp.	
Stroud, OK	7,500
Mallard Resources	
Gueydan, LA	7,400
Witco Chemical Corp.	
Bradford, PA	6,841
Huntway Refining Co. of Northern California	
Van Nuys, CA	6,750
Claiborne Gasoline Co.	
Lisbon, LA	6,500
Simmons Oil Co.	
Simmons Refining Corp.	
Great Falls, MT	6,300
Arizona Fuel Corp.	
Fredonia, AZ	6,000
Morrison Petroleum Co.	
Woods Cross, UT	6,000
Thriftway Oil Co.	
Bloomfield, NM	4,750
Graham, TX	1,184
Total	5,934
Lakeside Refining Co.	
Kalamazoo, MI	2,700
Crystal Refining Co.	
Carson City, MI	3,000
Total	5,700
Flying J Inc.	
Cutbank, MT	5,600
Somerset Refinery Inc.	
Somerset, KY	5,500
Warrior Asphalt Co. of Alabama	
Holt, AL	5,500
Huntway Refining Co.	
Wilmington, CA	4,750
Kenco Refining Inc.	
Wolf Point, MT	4,700
Nevada Refining Co.	
Tonopah, NV	4,500
Calumet Industries Inc.	
Calumet Refining Co.	
Princeton, LA	4,400
Oxnard Refinery	
Oxnard, CA	4,000
Thagard Oil Co.	
Lunday-Thagard Oil Co.	
South Gate, CA	3,700
Eddy Refining Co.	
Houston, TX	3,250
Crystal Oil Co.[25]	
Stephens, AR	3,200
Port Petroleum	
Stonewall, LA	3,200
B-T Energy Corp.	
Louisville, KY	3,000
GNC Energy Corp.	
Greensboro, NC	3,000
Young Refining Corp.	
Douglasville, GA	2,700
Petromax	
Houston, TX	2,000
Kentucky Oil & Refining Co	
Troy, IN	1,000
Betsy Lane, KY	600
Total	1,600
Flint Chemical Co.	
San Antonio, TX	1,500
Silver Eagle Refining Co.	
La Barge, WY	1,500
Moreco Energy Inc.	
McCook, IL	1,000
Petrolite Corp.	
Kilgore, TX	1,000
Shore Inc.	
Kilgore, TX	550
American Refining Group Inc.	
Indianola, PA	200
Mountaineer Refining Co. Inc.	
La Barge, WY	200

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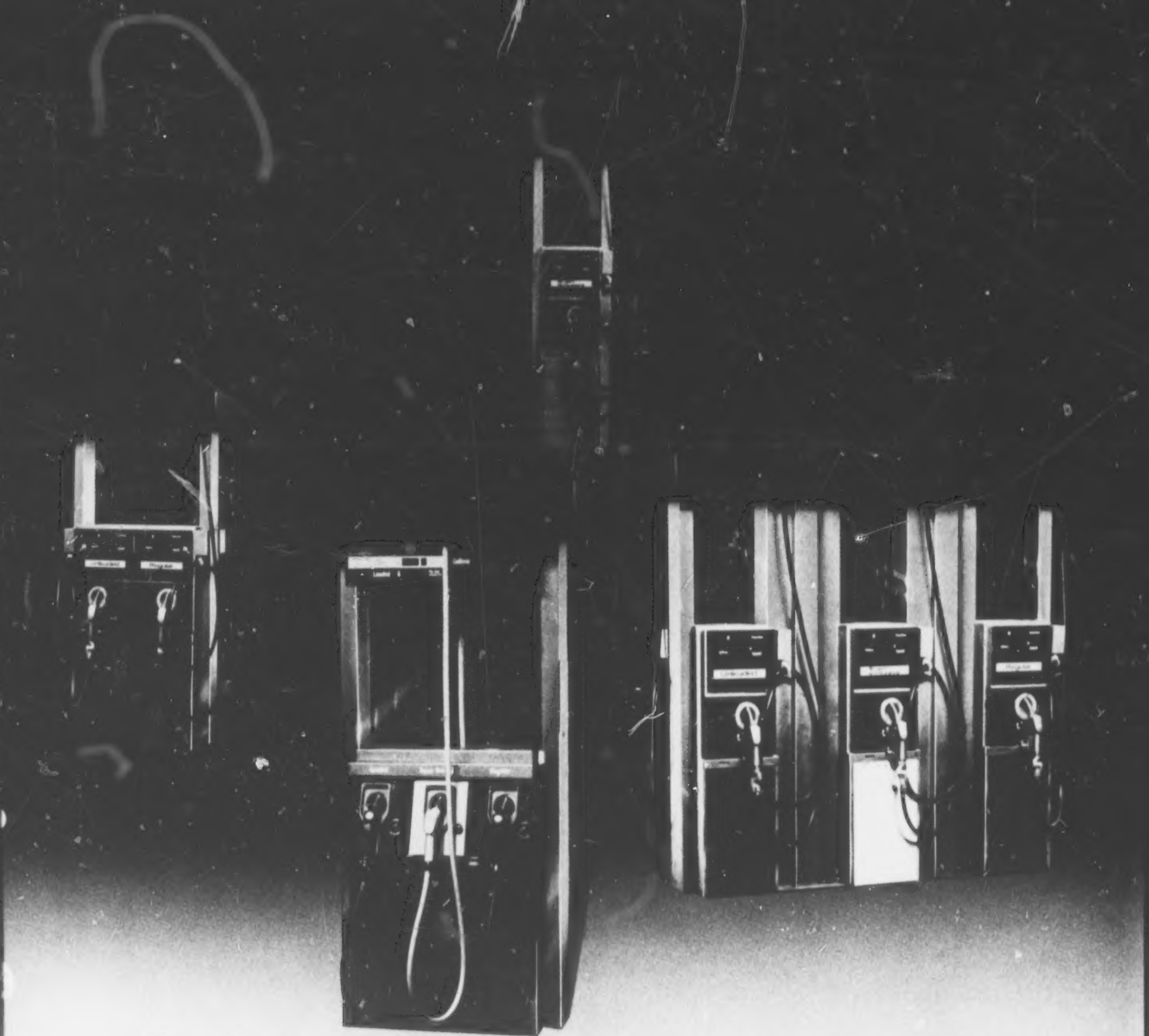
[1] Formerly Coastal Corp
[2] Merged with Gulf States Oil & Refining Co
[3] Formerly Cotton Valley Solvents Co
[4] Idle since 1974
[5] Formerly Earth Resources Co
[6] Formerly CRA, Inc
[7] Formerly Independent Refining Corp
[8] Formerly Little America Refining Co
[9] Formerly Tesoro-Alaskan Petroleum Corp
[10] Formerly Coral Petroleum Inc
[11] Formerly Coral Petroleum Inc
[12] Formerly Conoco Inc
[13] Formerly Texas Independent Corp
[14] Formerly Western Refining Corp
[15] Formerly Kern County Refinery Inc
[16] Formerly E-Z Serv Refining Inc
[17] Formerly La Jet Inc
[18] Formerly Shell Oil Co
[19] Formerly American Ultramar Ltd
[20] Formerly Gary Refining Co
[21] Formerly Slapco
[22] Formerly Mitchell Energy & Development
[23] Formerly Cross Oil & Refining Co. of Arkansas
[24] Formerly Laketon Asphalt Refining Co
[25] Formerly Berry Petroleum Co

Source: Petroleum Supply Annual, 1983, Energy Information Administration



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Locations differ dramatically in available space, in traffic pattern, and in volume potential.

That's why Southwest offers dispensers featuring strategic as well as cosmetic differences. Thus, we provide fuel marketers with meaningful choices available from no one else.

And every Southwest dispenser comes equipped with the most reliable, most accurate, most flexible electronics in the industry.

Take our high volume "Plus Series."

The unique 1 + 1, 2 + 2 and 3 + 3 dispensers enable the fuel marketer to maximize throughput at high volume locations. Because a pump computer is provided for each hose, all hoses can be utilized simultaneously. This maximizes simultaneous fueling capacity and greatly reduces drive-aways and drive-bys in peak traffic hours. This series is the only logical choice for potentially high volume locations where islands or driveway space is available.

Or take our space-saving 3PD.

In locations where space availability limits volume, the Southwest 3PD is the ideal dispenser. Though each bank of three hoses services just one customer at a time, that customer is provided the convenience of selecting from three grades of fuel. And because of the 3PD's shared electronics — one pump computer serves each bank of three hoses — the cost per hose is reduced significantly.

To find out more about Southwest dispensers and electronics, please write or call. Our address and phone number are provided below.

Southwest Pump Company
P.O. Drawer 280
Bonham, Texas 75418
214/583-3134

SOUTHWEST
Energy Control Systems

Distributors and Jobbers nationwide.

U.S. Refinery Closings—1981-1983

The pace slowed in 1983, but the U.S. refining industry still lost 11 more refineries with a total capacity of 501,350 b/d.

The Energy Information Administration said that the 11 refineries were either shut down permanently or mothballed indefinitely as of the end of the year.

Added to the shutdowns in 1981 and 1982, this means the refining capacity has now been reduced by 2.1-million b/d. Some of this capacity can be put back into operation, but the longer it is mothballed the more costly and difficult that becomes.

Shutdowns in 1983

PAD District/Refinery	b/d
Midwest	
Mobil Oil Corp., Augusta, Kan	50,000
Gulf Coast	
Erickson Refining Corp., Pt. Neches, Texas	30,000
GHR Energy Corp., Good Hope, La	300,000
Independent Refining Corp., Winnie, Texas	50,000
Marion Corp., Theodore, Ala	25,000
McTan Refining Corp., St. James, La	19,300
Shore Inc., Kilgore, Texas	550
Rocky Mountain	
Silver Eagle Oil, Ltd., La Barge, Wyo	1,500
West Coast	
Anchor Refining Co., McKittrick, Calif	9,000
Arizona Fuels Corp., Fredonia, Ariz	6,000
Demenno Resources, Compton, Calif	10,000
U.S. Total for 1983	**501,350**

Shutdowns in 1982

PAD District/Refinery	b/d
East Coast	
Amoco Oil Co., Baltimore, Md	15,000
Ashland Oil, Buffalo, N.Y.	64,000
Seminole Refining, St. Marks, Fla	15,000
Total	**94,000**
Midwest	
Amoco Oil Co., Sugar Creek, Mo	104,000
Ashland Oil, Findlay, Ohio	20,400
CRA, Scottsbluff, Neb	5,600
CRA, Phillipsburg, Kans	26,400
Dillman Oil Recovery, Oblong, Ill	1,200
E-Z Serv Refining, Shallow Water, Kans	9,500
Energy Cooperative, East Chicago, Ind	126,000
Industrial Fuel & Asphalt of Indiana, Hammond, Ind	7,600
Kentucky Oil & Refining Co., Betsy Lane, Ky	3,000
Mid-America Refining Co., Chanute, Kans	3,000
Northland Oil & Refining Co., Dickinson, N.D.	5,000
Phillips Petroleum Co., Kansas City, Kansas	80,000
Texaco, West Tulsa, Okla	50,000
Texas America Petrochemicals, West Branch, Mich	11,500
Total	**453,200**
Gulf Coast	
Bayou State Oil Corp., Hosston, La	3,000
Bronco Refining Co., Houston, Tex	2,250
Caribou-Four Corners Oil Co., Kirtland, N.M.	2,400
Clinton Manges, Palestine, Tex	6,000
Copano Refining Co., Ingleside, Tex	11,100
Dow Chemical U.S.A., Freeport, Tex	190,000
Eagle Refining Corp., Jacksboro, Tex	1,800
Giant Industries, Farmington, N.M.	13,500
Independent Refining Corp., Pt. Neches, Tex	30,000
Independent Refining Corp., Winnie, Tex	50,000
Lake Charles Refining Co., Lake Charles, La	28,000
Listo Refining Co., Donna, Tex	3,500
Longview Refining Co., Longview, Tex	14,000
Natchez Refining Co., Natchez, Miss	16,000
Petraco-Valley Oil & Refining Co., Brownsville, Tex	12,300
Placid Oil Co., Mont Belvieu, Tex	8,500
Quitman Refining Co., Quitman, Tex	6,600
Rio Grande Crude Refining, Brownsville, Tex	9,500
Rio Grande Recovery Systems, Brownsville, Tex	1,000
Schulze Processing, Tallulah, La	1,760
Sentry Refining, Corpus Christi, Tex	25,000
Shepard Oil Co., Jennings, La	10,000
Sooner Refining Co., Darrow, La	8,000
T & S Refining, Jennings, La	10,500
TARCO, Euless, Tex	6,000
Tipperary Refining Co., Wickett, Tex	7,320
Vicksburg Refining Co., Vicksburg, Miss	7,900
Wickett Refining Co., Wickett, Tex	8,000
Total	**493,930**
Rocky Mountain	
C & H Refinery, Lusk, Wyo	180
Caribou-Four Corners Oil Co., Woods Cross, Utah	7,200
Glacier Park Co./Osage, Wyo	10,000
Husky Oil Co., Cody, Wyo	11,500
Morrison Petroleum Co., Woods Cross, Utah	6,300
Sage Creek Refining Co., Cowley, Wyo	1,000
Texaco, Casper, Wyo	21,000
Total	**57,180**
West Coast	
Gibson Oil & Refining Co., Bakersfield, Calif	4,600
Lunday-Thagard Oil Co., South Gate, Calif	12,000
Sabre Oil & Refining, Bakersfield, Calif	10,000
United Independent Oil Co., Tacoma, Wash	730
West Coast Oil Co., Oildale, Calif	21,000
Total	**48,330**
U.S. Total for 1982	**1,146,640**

Shutdowns in 1981

PAD District/Refinery	b/d
East Coast	
ATC Petroleum, Wilmington, N.C.	11,900
ATC Petroleum, Newington, N.H.	13,400
Manatee Energy Co., Port Manatee, Fla	28,400
Mobil Oil Corp., Buffalo, N.Y.	43,000
Total	**96,700**
Midwest	
Amoco Oil Co., Wood River, Ill	104,000
Conoco Inc., Wrenshall, Minn	23,500
Dow Chemical U.S.A., Bay City, Mich	20,000
Energy Development, Crossville, Ill	1,000
Gulf Oil Corp., Toledo, Ohio	50,300
Kentucky Oil and Refining Co., Troy, Ind	1,500
Texaco, Lockport, Ill	72,000
Wireback Oil Co., Plymouth, Ill	1,800
Total	**274,100**
Gulf Coast	
Adobe Refining Co., La Blanca, Tex	5,200
Carbonit Refinery, Hearne, Tex	11,000
Gulf Oil Corp., Venice, La	28,700
Southern Union Refining Co., Monument, N.M.	5,400
Southland Oil Co., Yazoo City, Miss	5,500
Texas Refining Co., Midland, Tex	2,500
Texas Standard Refining, Houston, Tex	1,800
Total	**60,100**
Rocky Mountain	
Glenrock Refinery, Glenrock, Wyo	6,000
Southwestern Refining Co., La Barge, Wyo	1,040
Total	**7,040**
West Coast	
Quad Refining Corp., Bakersfield, Calif	7,000
Road Oil Sales, Bakersfield, Calif	6,000
Total	**13,000**
U.S. Total for 1981	**450,940**

Source: Department of Energy, Petroleum Supply Annual for 1981; Petroleum Supply Monthly, February, 1983 for 1982.

Association Who, What and Where

American Petroleum Institute

2101 L St., N.W.
Washington, DC 20005
Phone: (202) 682-8000
6,750 members election Nov. 84

Petroleum Marketers Association of America

(Formerly National Oil Jobbers Council)
1707 H St. NW
Washington, D.C. 20005
Phone: (202) 331-1198
Represents more than 20,000 independent petroleum marketers
election Nov. 85
Pres: Jack Griffith, Griffith Petroleum Inc., Stillwater, OK
Sr. VP: David Robinson, Robinson Oil Co., Garden City, KS
Northeastern VP: William E. Campbell, Campbell Oil Co., Olean, NY
North Central VP: Ron McGauvran, Dormac Oil Co., Clinton, IA
Southeastern VP: Tom Potter Sr., Tom Potter Oil Co., Morehead City, NC
South Central VP: William P. Wright, Western Marketing Co., Abilene, TX
Western VP: Gus Fleischli, Fleischli Oil Co., Cheyenne, WY
Exec VP: Philip R. Chisholm

SIGMA

Society of Independent Gasoline Marketers of America
8300 Greensboro Dr., Suite 640
McLean, VA 22102
Phone: (703) 448-8585
250 members election Nov
Pres: M. S. Kirschner, Kirschner Bros. Oil Co., Haverford, PA
Exec. Dir: Kenneth Doyle

Petroleum Equipment Institute

P.O. Box 2380
Tulsa, OK 74101
Phone: (918) 743-9941
1000 members election Sept. 84
Pres: Frank Grizzell, Kentucky Petroleum Equip. Co., Lexington, KY
Exec. VP: Howard Upton

Petroleum Marketing Education Foundation

P.O. Box 11187
3008 Millwood Dr.
Columbia, SC 29211
Phone: (803) 252-5646
800 contributors election Jan. 85
Pres: John Snow, Eastern Shore Oil Co., Fruitland, MD 21826
Exec. VP: J. Edgar Eubanks

REGIONAL

Arizona Oil Marketers Assn.
P.O. Box 26905
Phoenix, AZ 85068
Phone: (602) 942-9173
150 members election June
Pres.: Bob Daniel, Woody's Petroleum, Wickenburg, AZ
Assn. Exec: Andy Pala

Arkansas Oil Marketers Assn.
P.O. Box 229
Little Rock, AR 72203
Phone: (501) 374-6293
Exec. VP: Gene Goss

California Independent Oil Marketers Assn.
555 Capitol Mall, Suite 655
Sacramento, CA 95814
Phone: (916) 441-5166
477 members election Nov. 84
Pres: Mitch Dion, M.O. Dion & Sons, Inc., Long Beach, CA
Exec. VP: James F. Divine

Colorado Petroleum Mktrs. Assn.
4465 Kipling, Suite 104
Wheat Ridge, CO 80033
Phone: (303) 422-7805
150 members election Nov. 84
Exec. VP: Roy A. Turner

Empire State Petroleum Assn.
8 Westchester Plaza
Elmsford, NY 10523
Phone: (914) 592-8810
Pres: Frederick Giffords, Giffords Oil, Floral Park, NY
Exec. VP: Robert D. Lynch

Florida Petroleum Marketers Assn.
209 Office Plaza
Tallahassee, FL 32301
Phone: (904) 877-5178
330 members election Aug. 84
Pres: Jim Hinton Jr., Jim Hinton Oil Co., Live Oak, FL
Pres.-Elect: Davis Rembert, United Fuels Corp., Gainesville, FL 32601
Exec. VP: Carl Adams

Fuel Merchants Assn. of New Jersey
66 Morris Ave.
Springfield, NJ 07081
Phone: (201) 379-1100
477 members election Spring
Pres: H. Craig Allen, Central Jersey Oil Co., Lakewood, NJ
Exec. VP: Fred Sacco

Georgia Oilmen's Assn.
3300 NE Expressway, Suite 8-P
Atlanta, GA 30341
Phone: (404) 451-5916
355 members election May
Pres: Shack Wimbish, Colonial Oil Industries, Savannah, GA 31402
Exec. VP: Roger T. Lane

Idaho Intermountain Oil Marketers
2615 Ona St.
Boise, ID 83705
Phone: (208) 344-1152
104 members election June
Pres: Kent Johnson, Fearless Farris, Boise, ID
State Exec: Frank Sattler

Illinois Petroleum Marketers Assn.
112 West Cook St.
P.O. Box 1508
Springfield, IL 62704
Phone: (217) 544-4609
870 members election Mar
Pres: Donald Gleiber, Moffitt Oil Co., Waterloo, IL 62298
Exec. VP: William R. Deutsch

Independent Oil Men's Assn. of New England
(Serves Mass., N.H., Vt., R.I.)
21 Sea Breeze Ln.
Newcastle, NH 03854
Phone: (603) 436-8424
75 members election Oct. 84
Pres: Wilfred H. Hall

Independent Connecticut Petroleum Assn.
621 Farmington Ave.
Hartford, CT 06105
Phone: (203) 236-0851
350 members election June 84
Pres: John E. Cunneen, Danielson Oil Co., Danielson, CT
Exec. VP: Charles S. Isenberg

Indiana Oil Marketers Assn. Inc.
8780 Purdue Rd.
Indianapolis, IN 46268
Phone: (317) 875-9057
350 members election Sept. 85
Pres: Richard L. Johnson, Johnson Oil Co., Columbus, IN
Exec. Dir: L. Jack Stough

Inland Empire Chapter (IOMA)
E. 217 Third
Spokane, WA 99202
Phone: (509) 747-3158
27 members election June
Pres: Don Micheisen, North Central Petroleum, Omak, WA 98841
Exec. VP: Don Wessels

Intermountain Oil Marketers Assn.
(Serves Ariz., Idaho, Mont., Nev., Utah)
1800 S. West Temple #300
Salt Lake City, UT 84115
Phone: (801) 484-8719
506 members election June
Pres: Dennie Dunn, Dunn Jardine Oil, Salt Lake City, UT
Exec. Dir: Gerald Tedrow

Petroleum Marketers of Iowa
P.O. Box 6156
Des Moines, IA 50309
Phone: (515) 244-6273
676 members election Feb.
Pres: Larry Watson, Watson Oil Co., Stanton, IA 51573
Managing Dir: E. A. Kistenmacher

Kansas Oil Marketers Assn.
804 Merchants Nat'l Bank Bldg.
Topeka, KS 66612
Phone: (913) 233-9655
285 members election Mar
Pres: Stanley Brown, T&E Oil Co., Hutchinson, KS
Exec. Dir: Charles H. Nicolay

Kentucky Petroleum Marketers Assn.
612-A Shelby Street, Frankfort, KY 40601
Phone: (502) 875-3742
100 members election Mar. 85
Pres: Winslow Baker, Baker Petroleum Co., Warsaw, KY
Exec. Dir: Thomas H. Maxedon

Louisiana Oil Marketers Assn.
P.O. Box 1
Shreveport, LA 71161
Phone: (318) 221-4113
400 members election July
Pres: Kevin J. Gaubert, Gaubert Oil Co., Thibodaux, LA
Exec. Dir: Robert K. Butcher

Maine Oil Dealers Assn.
P.O. Box 536
Yarmouth, ME 04096
Phone: (207) 846-5113
300 members election June
Chmn: Richard Hawkins, Hamel Fuels

Michigan Petroleum Assn.
1200 Mich. Nat'l. Tower Bldg.
Lansing, MI 48933
Phone: (517) 487-9139
365 members election Apr
Exec. Dir: Thomas G. Cordell

Mid-Atlantic Petroleum Distributors Assn. (formerly Petroleum Council of Maryland
198 Thomas Johnson Dr.
Frederick, MD 21740
Phone: (301) 694-0808
250 members election Oct
Pres: Peter F. Horrigan, Steuart Petroleum Co., Beltsville, MD 20705
Exec. VP: Robert Ryan

Midwest Petroleum Marketers Assn.
10400 Higgins Rd., Suite 126
Rosemont, IL 60018
Phone: (312) 298-5370
275 members election May
Pres: Ernst Shafer, Smith Shafer Oil Co., Rockford, IL
Exec. Dir: Donald E. Woodrick

Mississippi Petroleum Marketers Assn.
P.O. Box 257
Jackson, MS 39205
Phone: (601) 353-1624
2 members election July 84
Pres: Dan Magruder, Magruder Oil Co., McComb, MS
Exec. Dir: Marshall Lusk

Missouri Oil Jobbers Assn.
238 E. High St., Suite 3A
Jefferson City, MO 65101
Phone: (314) 635-7117
400 members election Feb.
Pres: Gary Collier, Collier Oil Co., Moberly, MO
Exec. Dir: John R. Hahn

Montana Intermountain Oil Marketers
1217 Widner
Helena, MT 59601
Phone: (406) 442-6647
111 members election June
Pres: Harry Simons, Simons Petroleum, Shelby, MT
Assn. Exec: John Braunbeck

Nebraska Petroleum Marketers, Inc.
1320 Lincoln Mall
Lincoln, NE 68508
Phone: (402) 474-6691
392 members election Mar
Pres: Harold Swanson, Calhoun Oil Co., Ft. Calhoun, NE 68023
Exec. Dir: George L. Watters

Nevada Chapter (IOMA)
1800 S. West Temple
Salt Lake City, UT 84115
Phone: (801) 484-8719
41 members election June
Pres: Darwin Pilger, D&G Oil Co., Las Vegas, NV
Exec. Dir: Gerald Tedrow

New Mexico Petroleum Mktrs. Assn.
4465 Kipling, Suite 104
Wheat Ridge, CO 80033
Phone: (303) 422-7805
100 members election Nov. 84
Exec. VP: Roy A. Turner

North Carolina Oil Jobbers Assn.
P.O. Box 30519
Raleigh, NC 27606
755 members election Oct. 84
Pres: Rogers Clark, Sampson-Bladen Oil Co., Clinton, NC
Exec. VP: Don M. Ward

Northwest Petroleum Assn.
2345 Rice St., Suite 173
St. Paul, MN 55113
Phone: (612) 484-7227
600 members election March
Pres: Fred Curtis, Curtis Oil, Duluth, MN
Exec. Dir: Gerald W. Everett

Ohio Petroleum Mktrs. Assn.
50 West Broad Street, Suite 1130
Columbus, OH 43215
Phone: (614) 224-6271
400 members election Spring
Pres: Don Lykins, Lykins Oil Co., Milford, OH
Exec. VP: Roger F. Dreyer

Oil Jobbers of Wisconsin
1220 Femrite Dr.
Madison, WI 53716
Phone: (608) 221-4771
500 members election Apr
Pres: Charles McManus, McManus Oil Co., Brodhead, WI
Mgr. Dir: Raymond Karnes

Oklahoma Oil Mktrs. Assn.
5115 North Western
Oklahoma City, OK 73118
Phone: (405) 842-6625
300 members election March
Pres: Paul Welch, Welch Oil Co., Wichita Falls, TX
Exec. VP: Charles V. Stuckey

Oregon Oil Jobbers Assn.
3130 SW Ridgewood Rd.
Portland, OR 97225
Phone: (503) 292-1495
98 members election Nov.
Pres: Mike Hawkins, Hawk Oil Co., Medford, OR
Exec. VP: Bob Kupfer

Pacific Oil Conference
555 Capitol Mall, Suite 655
Sacramento, CA 95814
Phone: (916) 446-1312
784 members election Sept. 84
Gen. Chmn: Jack Todd, Truax Oil Co., Corvallis, OR
Exec. Dir: James F. Divine

Pennsylvania Petroleum Assn.
#2 Shore Drive Ctr., Suite 121
2001 N. Front St.
Harrisburg, PA 17102
Phone: (717) 233-5838
715 members election Sept. 84
Pres: John L. McDowell III, McDowell Oil Service, Inc., Bloomsburg, PA 17815
Exec. Dir: John P. Zinkand

Petroleum Council of Maryland
(Name changed to Mid-Atlantic Petroleum Distributors Assn.)

South Carolina Oil Jobbers Assn.
1809 Godsden
P.O. Box 64
Columbia, SC 29202
Phone: (803) 765-9570
280 members election Dec.
Pres: Frank "Willie" Wiles, Barnett Oil Co.
Exec. Dir: Dick deMontmollin

South Dakota Independent Oil Men's Assn.
P.O. Box 1058
Pierre, SD 57501
Phone: (605) 224-8606
election Sept.
Pres: Rudy Gerstner, Gerstner Oil Co., Yankton, SD
Exec. Dir: Curt Neuharth

Tennessee Oil Marketers Assn.
P.O. Box 23256
Nashville, TN 37202
Phone: (615) 242-4377
184 members election Nov. 84
Pres: E. J. Parker Jr., P&B Oil Co., Hartsville, TN
Exec. Dir: Elizabeth Walker

Texas Oil Marketers Assn.
701 W. 15th St.
Austin, TX 78701
Phone: (512) 476-9547
1,000 members election April
Pres: Homer McGinnis, Pride of Texas Distributing Co., Arlington, TX
Exec. VP: Dave Fellers

Utah Chapter (IOMA)
1800 S. West Temple
Salt Lake City, UT 84115
Phone: (801) 484-8719
120 members election June
Pres: Jerry Wagstaff, Holiday Oil, W. Valley City, UT 84119

Virginia Petroleum Jobbers Assn.
P.O. Box 6344
Richmond, VA 23230
Phone: (804) 282-7534
213 members election Oct. 84
Pres: Terry Phelps, Whiting Oil Co., Roanoke, VA
Exec. Dir: E. D. Catterton

Washington Oil Marketer's Assn.
10540 Valmay Ave. NW
Seattle, WA 98177
Phone: (206) 362-7319
election Dec. 84

West Virginia Oil Jobbers-Distributors Assn.
Atlas Bldg., Suite 806
Charleston, WV 25301
Phone: (304) 343-5885
75 members election Sept. 84
Pres: Oscar B. Thompson, Dawson-Thompson Oil Co., Huntington, WV 26703
Exec. Dir: David W. Haines

Wyoming Petroleum Mktrs. Assn.
4465 Kipling, Suite 104
Wheat Ridge, CO 80033
Phone: (303) 422-7805
70 members election Nov. 84
Exec. VP: Roy A. Turner

PRIVATE BRAND

Georgia Independent Oil Men's Assn.
(Name changed to Southeastern Independent Oil Marketers 7-1-80)

Independent Gasoline Marketers Council
1015 18th St. N.W.
Washington, DC 20036
Phone: (202) 857-0220
20 members
Pres: Jack A. Blum

Independent Oil Men's Assn. of Alabama
200 Century Park South, Suite 126
Birmingham, AL 35226
Phone: (205) 823-4857
165 members election June 84
Exec. Dir: Rick McIntosh

Kentucky Independent Gasoline Marketers Assn.
3906 Dupont Sq. S.
Louisville, KY 40207
Phone: (502) 897-7167
60 members election Jan.
Pres: Keith Miller, Transit Oil, Louisville, KY 40203
Exec. Dir: Jesse F. Simpson

Mid-America Gasoline Mktrs. Assn.
(Disbanded in 1982)

Serve Yourself & Multiple Pump Assn.
3960 Wilshire Blvd., Ste. 401-A
Los Angeles, CA 90010
Phone: (213) 387-3114
election Nov.
Pres: R. A. Sturegeon
Exec. Sec: Paul T. Erdos

Southeastern Independent Oil Marketers Assn.
6065 Barfield Rd. NE, Suite 104
Atlanta, GA 30328
Phone: (404) 256-5541
502 members election June 84
Pres: Keith Greenfield, O.K. Oil Co., Griffin, GA 30233
Exec. Dir: Ivan Maple

Texas Independent Producers & Royalty Owners Assn.
1910 InterFirst Tower
Austin, TX 78701
Phone: (512) 477-4452
5,400 members election June 84
Pres: Bruce Anderson, Anderson Oil Corp., Houston, TX
Exec. VP: Julian G. Martin

EQUIPMENT

Equipment & Tool Institute
1545 Waukegan Rd.
Glenview, IL 60025
Phone: (312) 729-8550
Exec. Mgr.: Don R. Proven

International Carwash Assn. National Carwash Council
4415 W. Harrison St., Suite 200
Hillside, IL 60162
Phone: (312) 449-7430
2,500 members election June 84
Exec. Dir: R. R. Trantham

National Conference on Weights and Measures
P.O. Box 3137
Gaithersburg, MD 20878
Phone: (301) 921-3677
1,500 members election July 84

The Packaging Institute, USA
20 E. 46th St.
New York, NY 10017
Phone: (212) 687-8875
3,000 members election June 84
Pres: Steve Resina, 572 Smith St., Brooklyn, NY 11231
VP: Robert Kelsey, Kelsey Corp., 271 Orchard Pl., Ridgewood, NJ 07450

Steel Tank Institute
666 Dundee Rd., #705
Northbrook, IL 60062
Phone: (312) 498-1980
65 members election Feb.
Pres: J. Denny Stidham, Chicago Boiler Co., 1965 Clybourne Ave., Chicago, IL
Exec. VP: Brian C. Donovan

Truck Trailer Manufacturers Assn.
1020 Princess St., Alexandria, VA 22314
Phone: (703) 549-3010
200 members election May
Pres: Charles J. Calvin

FUEL OIL

Better Home Heat Council
118 Cedar St.
Wellesley Hills, MA 02181
Phone: (617) 237-0730
250 members election Fall 84
Chmn: Donald G. Hughes, Hughes Oil Co., West Roxbory, MA
Exec. Dir: Jeffry W. Raynes

Better Home Heat Council of New Hampshire
25 Sea Breeze Lane
New Castle, NH 03854
Phone: (603) 436-8424
49 members election Dec.
Chmn: Phil Corbett, Corbett Oil Co., Newport, NH
Pres.: Wilfred H. Hall

Independent Heating Oil Dealers Assn.
446 Powers Bldg.
Rochester, NY 14614
Phone: (716) 546-8288
14 members election June 84
Pres: Abraham Duriel, Orco Petroleum Co., Rochester, NY 14614
VP: Samuel Costanza

National Assn. of Oil Heat Service Managers
P.O. Box 380
Elmwood Park, NJ 07407
Phone: (201) 796-1821
1,500 members election June 84
Pres: William H. Erickson, H. W. Erickson Oil Co., Princeton, MA 01541
Exec. VP: Charles W. Parliman

New England Fuel Institute
20 Summer St., Box 888
Watertown, MA 02172
Phone: (617) 924-1000
1,032 members election Mar.
Chmn: Robert Wesson, Wesson Oil Co., Waterbury, CT 06708
Pres: Charles H. Burkhardt

New York Oil Heating Assn.
225 W. 34th St., Rm. 1202
New York, NY 10122
Phone: (212) 695-1380
200 members election June
Pres: Walter Knitter, K. Co., Inc., Brooklyn, NY 11207
Exec. VP: James R. Wells

Oil Fuel Institute of Florida
P.O. Box 7729
Orlando, FL 32854
Phone: (305) 843-1198
35 members election Spring
Pres: Arnold Seaton, Eastern Seaboard Petroleum Co., Jacksonville, FL 32208
Exec. Dir: Mark V. Barker Jr.

Oil Heat Assn. of Greater Washington
(Name changed to Mid-Atlantic Petroleum Distributors Assn.)

Oil Heat Institute
5 Franklin Rd.
East Greenwich, RI 02818
Phone: (401) 885-1301
90 members election May
Pres: Peter Lombardi Jr., Hy-Test Oil Co., Johnson, RI 02919
Exec. Dir: J. Howard King

Oil Heat Institute of Long Island
Hanover Sq. Plaza
601 Veterans Memorial Hwy.
Hauppauge, NY 11788
Phone: (516) 360-0200
150 members election Jan. 85
Pres: Edward Minicozzi, General Utilities, Oyster Bay, NY 11771
Exec. VP: Kevin M. Rooney

Oil Heat Institute of Oregon
P.O. Box 42227
Portland, OR 97242
Phone: (503) 231-4850
Exec. Dir: Gregory M. Stewart

Oil Heat Institute of Idaho
P.O. Box 172
Boise, ID 83701
Phone: (208) 344-1152
37 members election Jan. 85
Pres: Bob Nicholes, Bonico, Caldwell, ID
Dir: Marvin Bodine

Oil Heat Institute of Washington
400 Dexter Ave., N.
Seattle, WA 98109
Phone: (206) 623-8730
300 members election June 84
Pres: Roger Jensen, Port Orchard Oil, Port Orchard, WA 98366
Exec. Dir: C. Edward Bishop

Oil Heat Institute of Upstate New York
Chamber of Commerce Bldg.
55 St. Paul St.
Rochester, NY 14604
Phone: (716) 454-2220, x41
25 members, 20 associates
election Nov. 85
Pres: George Wilson, Rogers Fuel Corp., Rochester, NY
Exec: VP Mara G. Hynes

LP-GAS

National LP-Gas Assn.
1301 W. 22nd St.
Oak Brook, IL 60521
Phone: (312) 986-4800
3,700 members election May
Pres: W. E. Denny, Petrolane Inc., Long Beach, CA
Exec. VP: J.D. Capps

LUBRICATION

American Society of Lubrication Engineers
838 Busse Highway
Park Ridge, IL 60068
Phone: (312) 825-5536
3,700 members election May
Pres: James E. Steenbergen, Union Carbide Corp.
Exec. Dir: Maxine E. Hensley

Assn. of Petroleum Re-Refiners
2025 Pennsylvania Ave. NW
Suite 1111
Washington, DC 20006
Phone: (202) 833-2694
100 members election Fall 84
Pres: George T. Booth III, Booth Oil Co., Buffalo, NY
Exec. Dir: James A. McBain Jr.

Independent Lubricant Manufacturers Assn.
1055 Thomas Jefferson St. NW #302
Washington, DC 20007
Phone: (202) 337-3470
210 members election Oct. 84
Pres: Stephen McCollister, McCollister & Co., Council Bluffs, IA 51502
Exec. Secy: Nancy DeMarco

National Lubricating Grease Institute
4635 Wyandotte St.
Kansas City, MO 64112
Phone: (816) 931-9480
217 members election Oct. 84
Pres: T. S. Quigg, Union Oil Co. of Calif., Schaumburg, IL 60196
Exec. Dir: R. W. [illegible], Southwest Petrochem

RETAIL

National Assn. of Truck Stop Operators
1199 N. Fairfax St., Suite 801
Alexandria, VA 22314-1492
Phone: (703) 549-2100
1,000 members election July 84
Chmn: Jack Cardwell, El Paso, TX
Pres: Ronald L. Ziegler

Service Station Dealers of America
2021 K St. N.W., Suite 303
Washington, DC 20006
Phone: (202) 293-6868
45 affiliated state associations
election 1984
Pres: Don Skilling, California Service Station Assn., Petaluma, CA 94950
Exec. Dir: Vic Rasheed

Assn. of Retail Marketing Services (Formerly Trading Stamp Institute of America)
412 Ocean Ave.
Sea Bright, NJ 07760
Phone: (201) 842-5070
250 members election Sept. 84
Pres: William S. Karstens, Affiliated Mercantile, Amarillo, TX
Exec. Dir: George Meredith

TBA/CAR SERVICE

Automotive Exhaust Systems Mfrs. Council
222 Cedar Lane
Teaneck, NJ 07666
Phone: (201) 836-9500
5 members
Pres: Edward Svoboda, Midas International
Exec. Dir: Ralph W. Van Demark

Automotive Information Council
28333 Telegraph Rd., Suite 403
Southfield, MI 48034
Phone: (313) 559-5922
625 members election Dec. 84
Pres. Richard C. Stankey

Automotive Market Research Council
222 Cedar Lane
Teaneck, NJ 07666
Phone: (201) 836-9500
90 members election March
Pres: J. C. McCourt, Union Carbide Corp.
Exec. VP: Hugh Sloan

Automotive Parts & Accessories Assn.
5100 Forbes Road, Lanham, MD 20706
Chmn: P. H. Noznesky, General Battery Corp., Reading, PA
Pres: Julian C. Morris

Automotive Parts Mfrs. Assn. of Canada
55 York St., Suite 402
Toronto, Ont., Canada M5J1R7
Phone: (416) 366-9673
350 members election April
Pres. P. J. Lavelle

Automotive Service Industry Assn.
444 N. Michigan Ave.
Chicago, IL 60611
Phone: (312) 836-1300
8,500 members election Feb.
Chmn: James Fournier, VP Mktg., Maremont Corp.
Chief Staff Officer: J. W. Neninger

Automotive Warehouse Distributors Assn.
9140 Ward Parkway
Kansas City, MO 64114
Phone: (816) 444-3500
716 members
Pres. Martin Fromm
Exec. VP: Louis A. Zuanich

Battery Council International
111 East Wacker Dr.
Chicago, IL 60601
Phone: (312) 644-6610
315 members election April
Pres. Ed Taylor, Delco Battery, Baton Rouge, LA
Exec. Sec. William W. Carpenter

Brake System Parts Manufacturers Council
222 Cedar Lane
Teaneck, NJ 07666
Phone: (201) 836-9500
20 members election March
Chmn: James Lyle, International Brake Industries
Exec. Dir: Ralph Van Demark

Independent Battery Manufacturers Assn.
100 Larchwood Dr.
Largo, FL 33540
Phone: (813) 586-1409
291 members
Chmn: Gordon W. Mixon Jr., Mixon Inc., St. Paul, MN

International Oil Industry TBA Group
P.O. Box 2463
R. L. Myrick
Houston, TX 77001
Phone: (713) 241-2926
300 members election Oct. 84
Chmn: Robert L. Myrick
P.O. Box 2463
Shell Oil Co.
Houston, TX 77001

Motor & Equipment Manufacturers Assn.
222 Cedar Lane
Teaneck, NJ 07666
Phone: (201) 836-9500
750 members election Mar.
Chmn: George A. Poe, TRW Inc., Cleveland, OH
Pres: W. A. Raftery

National Automotive Parts Assn.
Parklane Towers W., Suite 1129
Dearborn, MI 48126
Phone: (313) 336-8200

National Automotive Radiator Service Assn.
P.O. Box 267
Harleysville, PA 19438
Phone: (215) 256-4246
1100 members election July
Pres: Ronald Matlack, City Auto Radiator, Trenton, NJ
Exec. VP: Douglas Verney

National Tire Dealers & Retreaders Assn., Inc.
1250 I St. NW, Suite 400
Washington, DC 20005
Phone: (202) 789-2300
5,000 members election Sept. 84
Pres: Jim F. Hughes, Hughes Tire Distrib., Asheville, NC 28801
Exec. VP: Philip P. Friedlander, Jr.

Tune-Up Manufacturers Institute
222 Cedar Lane
Teaneck, NJ 07666
Phone: (201) 836-9500
16 members election Feb.
Pres: David Trickey, TRW Automotive
Exec. Dir: Ralph W. Van Demark

TRUCKING

American Trucking Assns.
1616 P St., N.W.
Washington, DC 20036
Phone: (202) 797-5000
election Oct. 84
Chmn: Ernest S. Cox, Moss Trucking Co., 3027 N. Tryon St., Charlotte, NC 28221
Pres: Bennett C. Whitlock, Jr.

National Tank Truck Carriers
1616 P Street, N.W.
Washington, DC 20036
Phone: (202) 797-5425

Private Truck Council of America
1101 17th St., N.W., #310
Washington, DC 20036
Phone: (202) 785-4900

OTHERS

American Automobile Assn.
8111 Gatehouse Rd.
Falls Church, VA 22047
Phone: (703) 222-6000
24 million members election May 85
Pres. James B. Creal
Mng. Dir. P.A. Richard E. Hebert

American Independent Refiners Assn.
114 3rd St., S.E.
Washington, D.C. 20003
Phone: (202) 543-8811
50 members
Pres: Andrew E. Hill, Hill Petroleum, Houston, TX
Exec. Dir: Ray F. Bragg Jr.

American Petroleum Credit Assn.
City Place, Suite 600
730 Hennepin Ave. So.
Minneapolis, MN 55403
Phone: (612) 338-7331
400 members election Oct.
Pres: Carl H. Hines, Gulf Oil Products Co.
Exec. Sec.: S. J. Haider

American Petroleum Refiners Assn.
(Merged into American Independent Refiners Assn.)

American Society for Testing & Materials
1916 Race St.
Philadelphia, PA 19103
Phone: (215) 299-5400
29,000 members election Jan.
Chmn: Paul L. Strigner, Nat'l Research Council of Canada Fuels & Lubricants Dir.

Assn. of Oil Pipe Lines
1725 K St., N.W., Suite 1205
Washington, DC 20006
Phone: (202) 331-8228

Canadian Petroleum Assn.
1500, 633 Sixth Ave., S.W.
Calgary, Alta. T2P 2Y5
Phone: (403) 269-6721

Diesel Engine Manufacturers Assn.
712 Lakewood Center North
14600 Detroit Avenue
Cleveland, OH 44107
Phone: (216) 226-7700

Highway Users Federation
1776 Massachusetts Ave., NW
Washington, DC 20036
Phone: (202) 857-1200

Independent Fuel Terminal Operators Assn.
1700 Pennsylvania Ave., N.W.
Suite 300
Washington, DC 20006
Phone: (202) 637-9060
17 members election Oct. 84
Pres: L. P. Steuart II, Steuart Petroleum Co., Washington, DC
Gen. Council: John H. Zentay

Independent Liquid Terminals Assn.
1133 15th St. N.W., Suite 204
Washington, DC 20005
Phone: (202) 659-2301
election Nov. 84
Pres: John Prokop
Dir. of Admin. E. Bruce Calvert

Independent Petroleum Assn. of America
1101 16th St. N.W.
Washington, DC 20036
Phone: (202) 857-4700
9,500 members election Fall 84
Chmn: Jon Rex Jones, Jones Exploration, Houston, TX 77002
Exec. VP: Lloyd N. Unsell

Independent Refiners Assn. of America
(Merged into American Independent Refiners Assn.)

Mid-Continent Oil & Gas Assn.
711 Adams Office Bldg.
Tulsa, OK 74103
Phone: (918) 582-5166
7,600 members election Feb. 85
Pres. Wayne Gibbens, 1800 K St. N.W., Washington, DC 20006

National Assn. of Convenience Stores
5201 Leesburg Pike, Suite 600
Falls Church, VA 22041
Phone: (703) 578-1800
950 Retail, 700 Associate members
election Sept. 84
Pres. Kerley LeBoeuf
Chmn. George Miller, Miller Enterprises, Crescent, FL 32012

National Petroleum Council
1625 K St., N.W.
Washington, DC 20006
Phone: (202) 393-6100

National Fire Protection Assn.
Batterymarch Park
Quincy, MA 02669
Phone: (617) 770-3000
32,000 members election May
Pres: Robert W. Grant

National Petroleum Refiners Assn.
1899 L St., N.W.
Washington, DC 20036
Phone: (202) 457-0480
300 members election Mar.
Chmn: Mark E. Houser, Texas City Refining, Inc., Texas City, TX
Pres: Urvan Sternfels

National Assn. of Tax Administrators
444 North Capitol St., NW, Suite 334
Washington, DC 20001
Phone: (202) 624-5890
50 states election June 84
Pres: R. L. Halperin, State Tax Assessor, Bureau of Taxation, Augusta, ME 04333
Exec. Sec: Leon Rothenberg

Recreation Vehicle Industry Assn.
P.O. Box 204
Chantilly, VA 22021
Phone: (703) 968-7722
444 members election Sept. 84
Chmn: Norman Jacobsen, Contempo Enterprises
Pres. & Gen. Counsel: David Humphreys

Society of Automotive Engineers
400 Commonwealth Dr.
Warrendale, PA 15096
Phone: (412) 776-4841
40,000 members election Feb. 85

Western Oil and Gas Assn.
727 W. Seventh St., Suite 850
Los Angeles, CA 90017
Phone: (213) 627-4866
92 members election Dec.
Pres: T. E. Innocenzi, Shell Oil Co., Carson, CA 90749
VP & Gen. Mgr: Arthur O. Spaulding

■ **Attention Association Executives:** If your association is not currently listed, and you want to be included in the 1985 edition of the *Factbook*, write to Factbook Editor Association Listing, 950 Lee Street, Des Plaines, IL 60016

A UNIQUE MONEY-SAVING GIFT IDEA . . .

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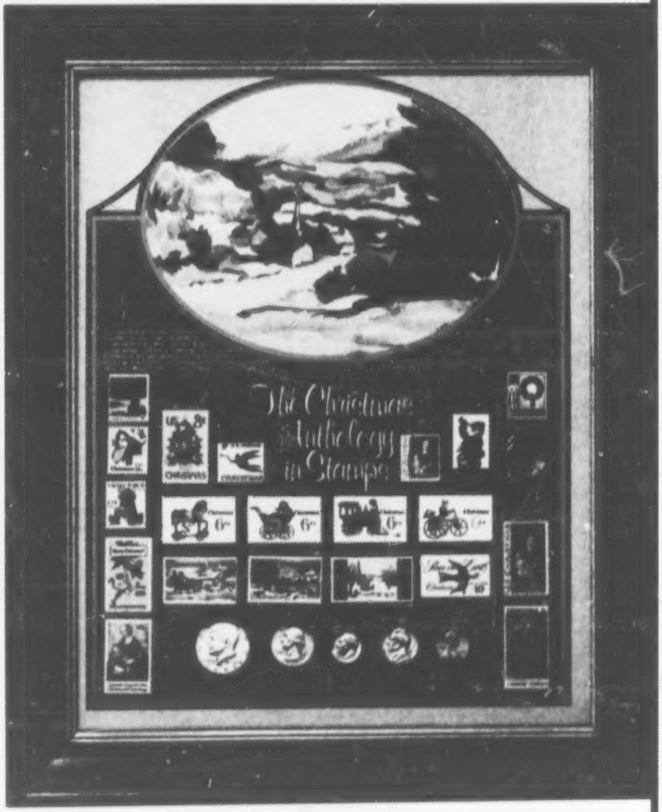
Twenty-one authentic, uncirculated Christmas stamps specially commissioned by the United States Post Office to commemorate the holiday seasons. The first of these special stamps appeared in 1962, and have been issued at a rate of at least one per year since that time. In 1966, the first religious theme, a detail of *"Madonna and Child With Angels"* by Hans Memling, was issued. In later years, the Post Office released other religious themes by Raphael, Van Eyck and Ghirlandaio. Included in this display of uncanceled Christmas Stamps is the first issue in 1962, *"Currier and Ives"* winter scenes, stamps that display the toys of yesteryear and several religious theme issues. **All stamps are guaranteed to be authentic issues of the United States Post Office.**

The present is represented with a Brilliant Uncirculated U. S. Mint Set. Each current year Mint Set contains a clad Kennedy Half Dollar; a clad Washington Quarter; a clad Roosevelt Dime; a Jefferson Nickel and a copper-plated, zinc Lincoln Cent. **All coins in this display are guaranteed to be genuine issues of the United States Mint.** Each ready-to-hang collection is assembled in a 13" x 16" walnut-finished, solid wood frame with a protective, clear plexiglass shield.



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NO. OF SETS	PRICE EACH	POSTAGE
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4 — 6	$ 32.50	$ 5.00 total
7 — 10	$ 30.00	$ 8.00 total

EXECUTIVE GIFT GUILD • P. O. BOX 5050 • DES PLAINES, IL 60016

EXECUTIVE GIFT GUILD • P. O. BOX 5050 • DES PLAINES, IL 60016
(in cooperation with The Kennedy Mint, Inc.)

FB 84

Please send ______ set(s) of the *"Christmas Anthology"* according to the prices listed below and my payment information shown at left.

#1031 — THE CHRISTMAS ANTHOLOGY

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7 — 10	$ 30.00	$ 8.00 total

SORRY: NO C.O.D.'s

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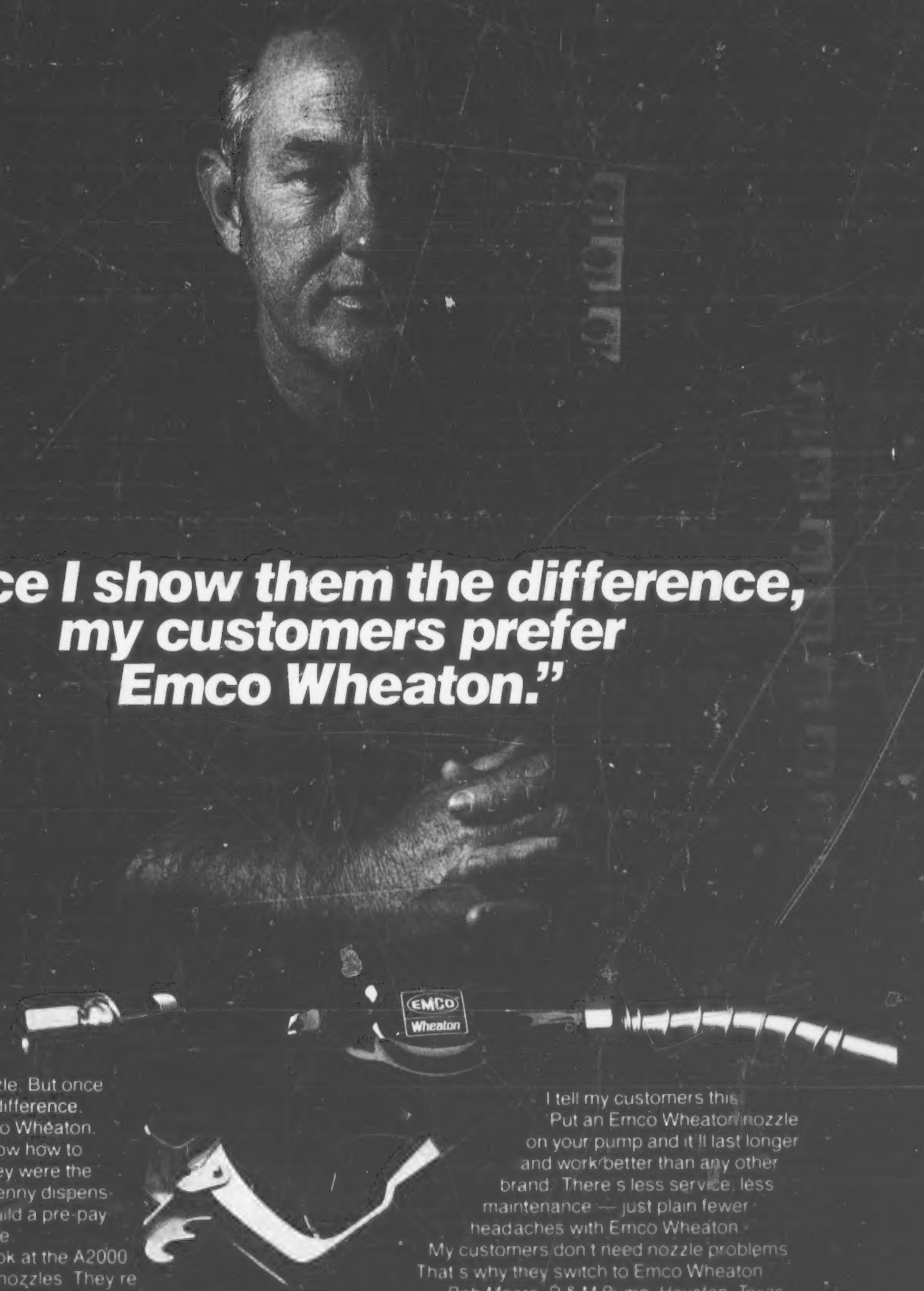
City ______ State ______

Zip Code ______ Telephone ( ) ______

Code ______

7



"Once I show them the difference, my customers prefer Emco Wheaton."

"A lot of people come into my store looking for any brand of nozzle. But once I show them the difference, they choose Emco Wheaton.

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— *Bob Moore, D & M Pump, Houston, Texas*

For more information call or write:

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Wheaton

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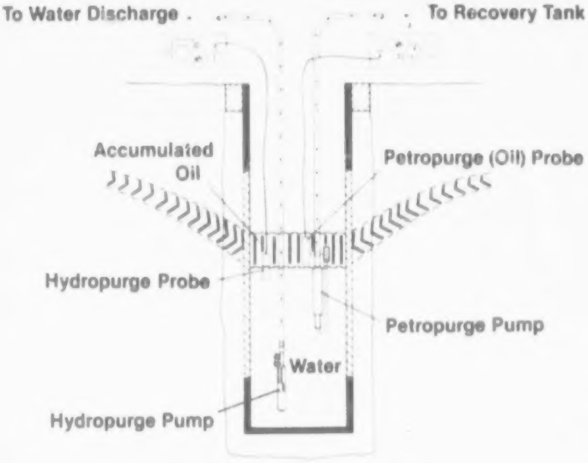

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A Mickelberry Company (NYSE)
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1. No purchase necessary. Complete official entry form per instructions. Winner will be selected in random drawings from among all eligible entries received. Prize not transferable. No substitution on the prize except as required by availability. Travel dates are subject to space and departure availability. Travel must be completed by 6/30/85.

2. Sweepstakes open only to employees of recognized advertising agencies or companies using advertising and promotion to market their merchandise or services, except employees and their families of Ventura Associates, Inc. All federal, state and local laws and regulations apply. To be eligible entries must be received by 11/30/84. Odds of winning are determined by total number of qualified entries received.

3. Winner will be notified by mail and will be obligated to sign and return an Affidavit of Eligibility within twenty-one days of date on notification. Winner agrees to the use of his or her name and likeness for publicity. Taxes are the responsibility of the winner. To receive the name of the Grand Prize winner, send a stamped, self addressed envelope to: **Paradise Sweepstakes Winner, c/o Ventura Associates, Inc., 210 Madison Avenue, New York, NY 10016.**

Mail your entry to
Trip to Paradise
c/o Ventura Associates, Inc., 210 Madison Avenue, New York, NY 10016

Name ____________________

Company ____________________

Company Address ____________________

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Title/Assignment ____________________

Please check one of the statements below
☐ I believe that sweepstakes can be a valuable marketing tool for me
☐ I don't think sweepstakes would be right for my target audience

NPN

Marketing Management Personnel

■ **ADA RESOURCES**
Div. of Adams Resources & Energy
P.O. Box 844
Houston, TX 77001
Phone: (713) 644-2111
Key: TM-Phillips; G, F, D, L
Subs: Buddy's Stores, Kirbyville Marketing Co.
K. S. Adams, Jr., Chmn.
Spencer Murchison, Pres.
C. G. Sones, Exec. VP
E. H. Laws, VP Mktg.
J. L. Parks, Mgr. Wholesale Sales
Allan Koerth, Mgr., Retail Sls.
David Clark, Credit Mgr.
John Singer, Mgr. Acct.
Lee Beachamp, Mgr. Products & Pricing

Brazosport Area Sls. Off.
Highway 35
Old Ocean, TX
Bob Kurz, Dist. Sls. Mgr.

■ **AERO OIL CO.**
230 Lincolnway East
New Oxford, PA 17350
Phone: (717) 624-4311
Key: TM-Phillips; G, F, D, L
N. T. Washburn, Pres.
Vance T. Ward, VP
E. G. Higinbotham, VP

■ **AGWAY PETROLEUM CORP.**
P.O. Box 4852
Syracuse, NY 13221
Phone: (315) 477-6478
Key: T-R-M; G, D, F, LPG, L
Sub. of Agway Inc.
Sub: Texas City Ref., Inc.
Robert J. Kutil, Pres.
Ralph D. Fuller, VP Supply & Purch.
Jack Williard, VP Marketing & Distrib.
W. F. Meckling, Whlsl. Sls. Mgr.
C. Caffarelly, Dir. of Sls.
S. B. Burnett, Dir. Mktg.
George Puzey, Mktg. planning Mgr.
K. M. Williams, Mktg. Comm. Mgr.

Eastern Div.
West Springfield, MA
Jack L. Babb, Mgr.

Northern Div.
Syracuse, NY
Daniel L. Goble, Mgr.

Southern Div.
Harrisburg, PA
Stanley F. Dudzinski, Mgr.

Texas City Refining
P.O. Box 1271
Texas City, TX 77590
Phone: (713) 945-4451
Sub. of Agway Petroleum (66-2/3) and Southern States Co-op (33-1/3)
Sub: TCR, Inc. (formerly Rebel Oil Co.)
Key: I; G, Fw, LPGw, D
Mark E. Houser, Pres.
J. L. Stratman, Sr. VP
W. B. Uhlhorn, Sls. Mgr.
S. B. Burnett, Asst. Sls. Mgr.
C. J. Schmitz, Mgr. Prod. Sup. & Distrib.
E. C. Nicar, Mgr. Prod. Sup.
J. B. McDonald, VP Finances

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline wholesale/retail
F	Fuel Oil wholesale/retail
D	Diesel wholesale/retail
LPG	Liquefied petroleum gas wholesale/retail
L	Lubricants wholesale/retail
w	wholesale only
r	retail only

■ **ALLIED MATERIALS CORP.**
Box 12340
Oklahoma City, OK 73157
Phone: (405) 842-4403
Key: R; D, F, LPGw, Lw
Sub of Entex Inc., Houston, Tex.
T. D. Barbour, Pres. & CEO
Patsy King, Gen. Sls. Mgr.
Patsy King, Adv. Mgr.
George Drake, Gen. Mgr. Ref. Div.
Sam Leake, Lubricant Sales
Don Jackson, Asphalt Sales
Bob Carter, Solvent Sales

■ **AMERADA HESS CORP.**
1185 Ave. of the Americas
New York, NY 10036
Phone: (212) 997-8500
Key: I; G, F, LPGw, L
Leon Hess, Chmn.
Philip Kramer, Pres. & CEO
H. W. McCollum, Chmn.-Fin. Comm.
Bernard T. Deverin, Exec. VP
L. J. Lambros, Exec. VP
R. F. Wright, Exec. VP
A. T. Jacobson, Group VP
Peter A. Dysert, Sr. VP
Neal Gelfand, Sr. VP
Norman Goldberg, Sr. VP
John B. Hess, Sr. VP
W. R. Jameson, Sr. VP
C. H. Norz, Sr. VP
R. K. Stafford, Sr. VP-Fin. & Controller
J. O. Trotter, Sr. VP
Nathan K. Trynin, Sr. VP
William R. Zimmerman, Sr. VP
G. A. Jamin, Treas.
A. T. Aitkens, VP
Nicholas D. Bernard, VP
Alan A. Bernstein, VP
M. B. Bianchi, VP
Thomas A. Bowman, VP & Auditor
Arthur R. Broadman, VP
J. F. Cassidy, VP
F. L. Clark, VP
T. A. Collins, VP
J. F. Connors, VP
D. W. Cook, VP
George F. Dewhurst, VP
John J. Duggan, VP
Charles J. Dunn, VP
Joseph R. Enloe Jr., VP
Joseph P. Gehegan, VP
Val M. Hebertson, VP
Louis Horvath, VP
W. T. Howard, VP
John J. Koval, VP
Donald Laing Jr., VP
W. S. H. Laidlaw, VP
Philip J. Mazzilli, VP
Robert McReynolds, VP
Seymour R. Miller, VP
B. J. O'Bryan, VP
Robert P. Powers, VP
V. J. Rifici, VP
Rene L. Sagebien, VP
R. L. Smernoff, VP
John Steed, VP
D. G. Stevenson, VP
L. A. Stricklin, VP
Carl T. Tursi, VP and Sec.
Harry F. Warnke, VP
Andrew Zizinia, VP

Patchogue Oil Terminal Corp.
722 Court St.
Brooklyn, NY 11231
Phone: (212) 875-0797
Key: M; Fw, Dw
Sub: J. P. Leonard Fuel Oil Co.
F. B. Bushey, CEO
Arthur I. Soule, Pres.
G. J. Bushey, Supply & Distrib.

■ **AMERICAN OIL & SUPPLY CO.**
An Aosi Company
238 Wilson Ave.
Newark, NJ 07105
Phone: (201) 589-0250
Subs: Fairfield American Corp.
Frenchtown American Corp.
Timothy Driscoll, CEO
Edwin Roth, Dir. Mktg.
Nathan Lafer, Sls. Mgr.
Glenn Boyle, Prod. Mgr.
Charles Sharp, Mgr., Sls. Mktg. Admin.

■ **AMERICAN PETROFINA**
P.O. Box 2159
Dallas, Texas 75221
Phone: (214) 750-2400
Key: I; Gw, Fw, LPGw, Lw, Dw
Sub. of Petrofina, S. A. (72%)
Subs: American Petrofina Marketing Inc.
FinaServe, Inc.
Porto Fina Oil Co.
R. I. Galland, Chmn.
P. D. Meek, Pres.
R. C. Low, VP Mktg.
J. L. Thomas, Gen. Mgr., Distrib. Sls.
R. E. Piner, Asst. Mgr., Distrib. Sls., Southeast Area
D. W. Randolph, Asst. Mgr., Distrib. Sls., Southwest Area
H. G. Johnson, Market Analyst
J. L. Rudeseal, Gen. Mgr., Lube & TBA
F. N. Cox, Lube Oil Sls. Mgr.
J. R. Solomon, TBA Sls. Mgr.
J. W. Boyd, Gen. Mgr., Mktg. Opns.
J. W. Cahill, Jr., Dir., PR
M. J. Couch, Gen. Mgr., Supply & Trans.
C. B. Crow, Jr., Mgr., Prod. Supply
J. D. Howell, Gen. Mgr., Ref. Sls.
B. L. Martin, Mgr., Wholesale Credit

Southwest Area
Lubbock, TX, District
P.O. Box 3886
C. S. Williams, Mgr.

Dallas, TX, District
1186 W. Pioneer Pkwy.
(Arlington, TX)
S. L. Mullins, Mgr.

San Antonio, TX, District
8626 Tesoro Drive
J. M. Schrampfer, Mgr.

Southeast Area
Memphis, TN, District
3171 Directors Row
W. W. Malphrus, Mgr.

Atlanta, GA, District
2970 Parrott Ave., N.W.
J. E. Payne, Mgr.

Tampa, FL, District
P.O. Box 75285
K. W. Harmon, Mgr.

■ **AMERICAN PETROLEUM DEVELOPERS**
319 Ulysses St., NE
Minneapolis, MN 55413
Phone: (612) 331-9344
Key: M; Gr
Robert Mack, Pres.
Charles Mack, VP

■ **AMOCO OIL CO.**—listed under Standard Oil Co. (Indiana)

■ **AMOS POST, INC.**
Absorbed by Kingston Oil Supply Corp., Port Ewen, NY

■ **ANCHOR GASOLINE CORP.**
114 E. 5th St.
Tulsa, OK 74103
(918) 584-5291
Key: R-M; D, Gw, Dw
Subs: Canal Refining Co.
Anchor Coal Co.
Cove Petroleum Corp.
Bay Petroleum Corp.
Clear Creek Coal Co., Inc.
Joe R. Wright, Pres.
B. A. Mockley, Exec. VP
E. W. Clopton, VP
C. R. Dupre, VP

■ **APEX OIL CO.**
7930 Clayton Rd.
Richmond Hts., MO 63117
Phone: (314) 889-9600
Key: I; G, F, D, LPG, L
Sub: Clark Oil & Refining Co.
Apex Towing Co.
Goldstein Oil Co.
Novelly Oil Co.
Samuel R. Goldstein, Chmn.
P. A. Novelly, Pres.
Karen Burns, Dir. PR

Clark Oil & Refining Corp.
8530 W. Natural Ave.
Milwaukee, WI 53227
Phone: (414) 321-5100
R. G. Reed, III, Pres. & CEO
J. H. Baumgartner, Exec. VP
J. R. Musha, VP Retail Mktg.
T. G. Henning, Gen. Sls. Mgr.

■ **APOLLO OIL CO.**—Sold to Beacon Oil Co. in Feb. '83)

■ **ARKLA CHEMICAL CORP.**
P.O. Box 21734
Shreveport, LA 71151
Phone: (318) 226-2813
Key: M; G, Fr, D, L
Sub. of Arkla, Inc.
Sheffield Nelson, Pres.
B. E. Harrell, Exec. VP
George Papageorge, Sr. VP
Charles Wilbanks, Gen. Sls. Mgr.
Robert Butcher, Adv. Mgr.

■ **ARLEX OIL CORP.**
275 Massachusetts Ave.
Lexington, MA 02173
Phone: (617) 862-3400
Key: M; Fr
John Maloney, Pres.
Wm. Maloney, VP
David F. Eagle, VP

■ **ARMOUR OIL CO.**
P.O. Box 85302
San Diego, CA 92138
Phone: (619) 291-1000
Key: T, M; G-Gas-N-Save, M23, D, F-M23, L
O. B. Armour, Pres.-CEO
L. M. Armour, Exec. VP
H. O. Armour, VP Mktg.

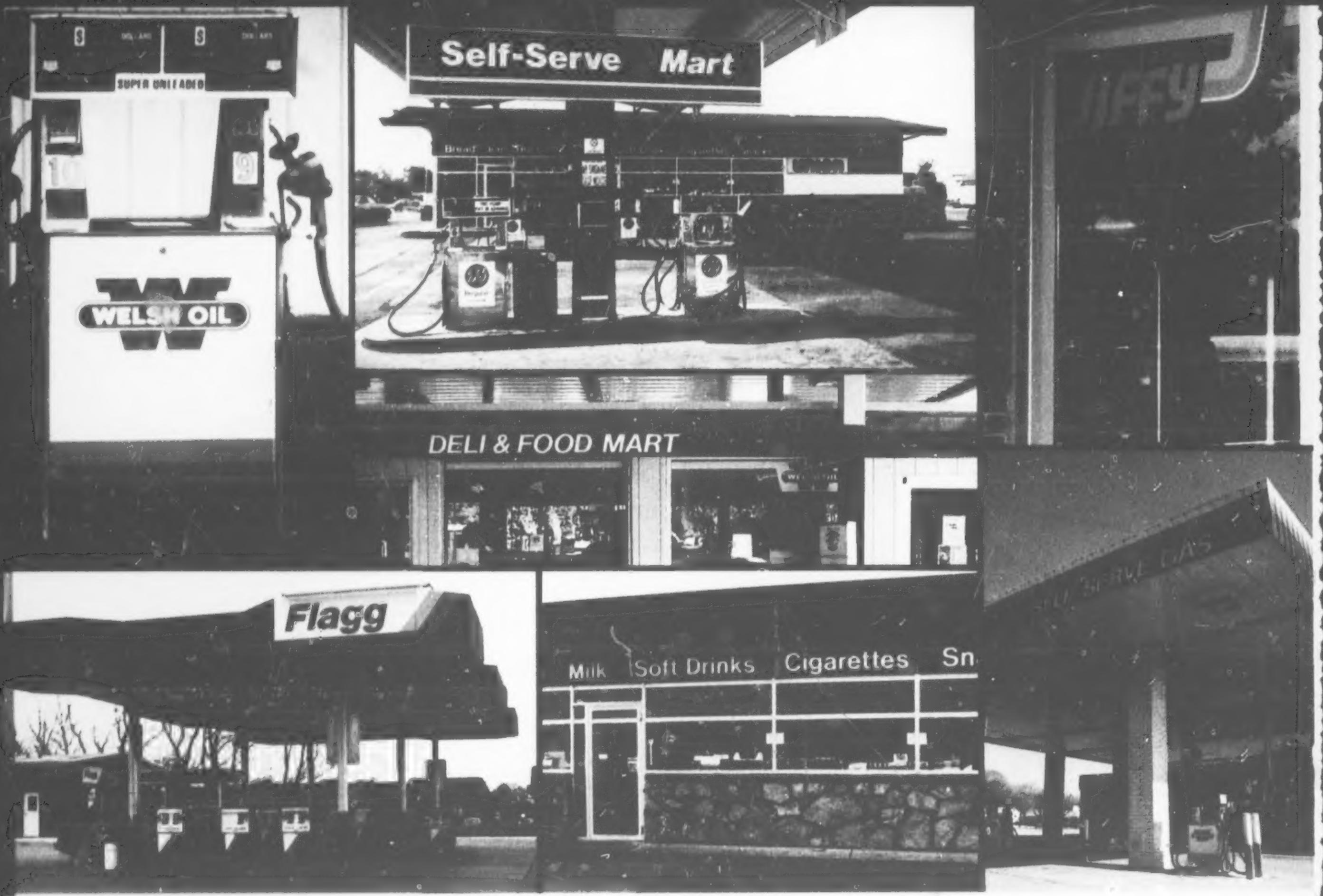
■ **ASHLAND OIL, INC.**
P.O. Box 391
Ashland, KY 41114
Phone: (606) 329-3333
Key: I; G, D, F, LPGw, Lw
J. R. Hall, Chmn. and CEO
W. R. Seaton, Vice Chmn. Fin.
R. T. McCowan, Vice Chmn., Ex. Aff.
P. W. Chellgren, Sr. VP and Group Oper. Officer
W. C. Voss, Sr. VP, Group Oper. Officer
C. J. Luellen, Sr. VP and Group Oper. Officer and Pres.
R. W. Spears, Sr. VP and Group Oper. Officer

ASHLAND PETROLEUM CO.
P.O. Box 391
Ashland, KY 41114
Phone: (606) 329-3333
Key: I; G, D, F, LPGw, Lw
C. J. Luellen, Pres.
R. E. Yancey Jr., Sr. VP Manuf., Crude Supply and Trans.

Light Products Marketing Group
J. E. Fout, VP Light Oil Prod.
C. R. Lovorn, VP Ref. Sls.
J. W. Moren, Mgr. Trans. Fuels
G. L. Hess, Div. Mgr., Atlanta
J. C. Snyder, Div. Mgr., Baltimore
D. R. Davis, Div. Mgr., Cincinnati
H. T. Thompson, Div. Mgr., Chicago
L. H. Dunbar, Reg. Mgr., Cincinnati
R. C. McGrew, Div. Mgr., St. Paul Park

Retail Marketing Group
R. A. Jensen, VP and Pres. of SuperAmerica Stores Div.
R. C. Ball, Admin. Mgr.
G. K. Townsend, VP SuperAmerica Oper.
J. F. Pettus, VP Save Mart Div.

Supply and Transportation
S. S. Watson, Group VP Supply and Transp. Asphalt and Industrial Products
D. J. Stender, VP Supply and Distrib.
R. H. Chatfield Jr., VP Asphalt Mktg.



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■ASTROLINE CORPORATION
(Formerly Gibbs Oil Co.)
855 Broadway
Saugus, MA 01906
Phone: (617) 231-1400
Key: M: Gw, Dw, Fw, LPGw, Lw
Herbert A. Sostek, Chmn. of the Board
Fred J. Boling Jr., Pres.
Joel A. Gibbs, VP
Richard H. Gibbs, VP
Kenneth B. Monahan, VP
Edward I. Shub, VP
Richard J. Sullivan, VP
Stephen D. Oppenheim, VP

Gibbs Oil Company of Texas, Inc.
7600 West Tidwell—Suite 302
Houston, Texas 77040
Phone: (713) 690-4256
John B. Kane, Exec. VP
E. C. Hancock, Sr. VP
Victor Brossett, VP
Stephen Berger, VP

ASTROLINE PACIFIC, INC.
Phone: (213) 437-8997
Gerald Smith, VP

■ATLANTIC RICHFIELD CO.
515 South Flower St.
Los Angeles, CA 90071
Phone: (213) 486-3511
Key: I; G, F, LPG, L
Subs: Buckley & Scott Co.
  Griffith Consumer Co.
  Major Petroleum Co.
  Rossoe, Inc.
  Prestige Stations, Inc.
Robert O. Anderson, Chmn.
W. F. Kieschnick, Pres. & CEO

ARCO Petroleum Products Co.
(Los Angeles Headquarters)
Division of Atlantic Richfield Co.
515 South Flower
Los Angeles, CA 90071
J. S. Morrison, Pres.
G. H. Babikian, Sr. VP Mktg.
E. G. Reilly, Retail Mktg. VP
J. J. Conway, IC&D Mktg. VP
S. Stanworth, Distribution VP
S. L. McDonald, Mktg. Svcs. Mgr.
R. M. Fidler, TBA Mktg. Mgr.
W. J. Craig, Coord., Retail
R. Ise, Ind. Prod. Mktg. Mgr.
T. D. Wilson, Coord., IC&D
J. C. McDermott, New Mktg. Tech. Mgr.
W. C. Morrow, Distrib. Opns. Mgr.
J. E. Noon, Distrib. Svcs. Mgr.
M. E. Fitzpatrick, Aviation, Coke & Military Sales, Mgr.
P. T. Greer, Nat'l Credit Mgr.
H. G. Johnson, Vol. Plng. & Anl. Mgr.
J. J. Tebo, Sls. Development Mgr.

Philadelphia Region (Retail)
1500 Market Street-Centre Sq.
Philadelphia, PA 19101
W. M. Rennick, Mgr.

Syracuse Region (Retail)
1019 James Street
Syracuse, NY
W. J. Donovan, Mgr.

San Francisco Region (Retail)
2000 Alameda De Las Pulgas
San Mateo, CA 94403
J. D. Kowal, Mgr.

Los Angeles Region (Retail)
300 W. Glenoaks Boulevard
Glendale, CA 91202
T. R. Murphy, Mgr.

Eastern Zone (C & D)
1500 Market Street-Centre Sq.
Philadelphia, PA 19101
M. C. Balliet, Mgr.

Pacific Zone (C & D)
2000 Alameda De Las Pulgas
San Mateo, CA 94403
L. D. Murphy, Mgr.

Retail Heating Oil and Asphalt Mktg
2700 Passyunk Avenue
Philadelphia, PA 19145
R. L. Machon, Mgr.

Field Distrib. Area—East
1500 Market Street-Centre Sq.
Philadelphia, PA 19101
A. Leone, Mgr.

Field Distrib. Area—West
2000 Alameda De Las Pulgas
San Mateo, CA 94403
L. S. Monken, Mgr.

Natural Gas Liquids Performance Center
8222 Douglas Avenue
Dallas, TX 75225
P.O. Box 68
Dallas, TX 75221
R. D. Shelton, Mgr.

■ATLAS OIL CO. OF UTICA
Riverside Drive
P.O. Box 252
Marcy, NY 13403
Phone: (315) 724-7431
Key: T-M; G, D, F
Ronald J. Casatelli, Pres.
Peter J. Casatelli, Mktg. VP

■THE AUGSBURY ORGANIZATION
100 Lafayette Street
P.O. Box 408
Ogdensburg, NY 13669
Phone: (315) 393-6600; 6601
Sub: The Augsbury Corporation
Frank A. Augsbury, Jr., Chmn.
Leonard Braun, Pres. & CEO
Charles J. Bullard, Director, Mktg.

The Augsbury Corporation
St. Lawrence County Division
520 Riverside Avenue
P.O. Box 240
Ogdensburg, NY 13669
Phone: (315) 393-6300
Key: T, M; G-Chevron, Getty, Mobil, Citgo; D, F-Augsbury, L
Boyd E. Foster, VP Finance
Glenn R. Allen, Mgr., Corp. Relations
Joseph A. McCarthy, Mgr., Opns.
Lewis W. Manns, Mgr., Supply & Distrib.

Jefferson County Division
P.O. Box 281
Watertown, NY 13601
Phone: (315) 788-8740
Richard Burns, Mgr., Jefferson County Retail
Larry P. Fioretto, Assistant Director, Retail Gasoline

Plattsburgh Division
Lakeshore Road
Plattsburgh, NY 12901
Phone: (518) 561-4670
Ed Boyer, NENY Mgr., Opns. Mktg.

Vermont Division
P.O. Box 982
Burlington, VT 05401
Phone: (802) 862-9754
Marshall D. Holzer, Director, Heating Oil

■AUTOMATIC COMFORT, CORP.
P.O. Box 777
Hartford, CT 06142-0777
Phone: (203) 568-1200
Key: M; G-Citgo, Texaco, Sunoco, Mobil; G, D, F-Automatic Comfort, L
Subs: Oil Comfort, Inc.
  Gerber Oil Co.
  Petroleum Energy Corp.
  A. C. Fuel Corp.
  ZIP Corp.
  Petro Pantry Corp.
Lewis S. Sheketoff, Pres. & CEO
Ira Kirschner, Treas., Asst. Secy.
Sidney O. Melius, VP Opns.
Dann S. Foster, VP Mktg. (Gas)
Conrad L. Dwire, Sls. Mgr. Mktg. (Gas)
David A. Duchesne, Data Proc. Mgr.
Leonard F. Schumann, Svc. Mgr.
A. M. Myers, RFO Sls. Mgr.

■AVALON PETROLEUM CO.
16645 S. Crawford Ave.
Markham, IL 60426
Phone: (312) 333-3360
Key: M; G, F, D, L
John Eckenstein, Pres. & CEO
Luke Matic, Gen. Mgr.

■AYERS OIL CO.
4th & Grant Sts.
Canton, MO 63435
Phone: (314) 288-4466
Key: M-Phillips & Kerr McGee; G, F, D, L
R. E. Ayers, Pres., Chmn.
J. W. Ayers, First VP
O. L. Tobin, VP Pet. Mktg. & TBA Mktg.
K. F. Bishoff, VP Finance
Stephen W. Ayers, Secy.
James Crane, Treas.

■RICHARDSON AYRES, Inc.
(Name Changed To Petron, Inc.)

■BP CANADA
(Acquired by Petro-Canada on 3 1 83)

■BP OIL INC., See Standard Oil Co. (Ohio)

■BAGWELL OIL CO.
33 Market St.
Onancuck, VA 23417
Phone: (804) 787-3580
Key: T-M-Union; G, D, F, L
Subs: Fulcher & Martin, Cape Charles, VA; Bagwell Terminal & Transport, Onancock, VA
I. W. Bagwell, 3rd, Pres.
I. W. Bagwell, 4th, VP & CEO

■E. M. BAILEY DISTRIBUTING CO.
Box 2576
Paducah, KY 42001
Phone: (502) 442-4306
Key: M-Chevron; G, D, F, L
E. M. Bailey Sr., Pres., CEO
E. M. Bailey Jr., Exec. VP
John P. Drew, VP Mktg.
Gary W. Robertson, Gen. Sls. Mgr.

■BALLARD OIL & EQUIPMENT CO.
P.O. BOX 3898
135 Marginal Way
Portland, ME 04104
Phone: (207) 772-1991
Key: M; G, D, L
Edward P. Hacker, Pres.
E. Thomas Hacker, Treas.
(Mrs.) Irene Stults, Credit Mgr.
Wm. Drake, Petroleum Prod. Sls. Mgr.
Randall Stearns, Equip. Sls. Mgr.
Manley Harriman, Oper. Mgr.

■BATTENFIELD-AMERICAN, INC.
1575 Clinton St.
Buffalo, NY 14206
Key: Mfg.; Lw
Nathan D. Rosen, Pres., Treas. & Chmn.
John A. Bellanti, Exec. VP

■BATTENFELD GREASE & OIL CORP. OF NY
1174 Erie Ave.
P.O. Box 728
North Tonawanda, NY 14120
Phone: (716) 695-2100
Key: Prod.-M-Mfg.; Lw
John A. Bellanti, Pres.
Paul P. Converso, VP Mktg.
Thomas G. Musilli, VP Tech. Svcs.

■BEACON OIL CO.
525 W. Third St.
Hanford, CA 93245
Phone: (209) 582-0241
Key: R-M; G, Fw, D, LPGw, L
Sub. of American Ultramar LTD.
V. L. Anderson, Chmn. of the Board
D. E. Bacigalupo, Pres.
R. S. Usher, General Counsel
W. A. Dwelle, Sr. VP Mktg.
J. Mascitelli, Sr. VP Supply Distrib. & Refining
L. M. Lockhart, VP Admin.
J. H. Leonard, VP Refining
R. J. Lowe, VP Whlsl. Mktg.
R. Nagy, VP Fiscal Svcs.
H. P. Smith, VP Finance
M. A. Montevecchi, Controller
J. Kitto, Dir. of Budgets & Financial Plng.
M. Covert, VP Crude Supply
W. E. Empey, Adv. Public Relations Mgr.
G. C. Gaither, Retail Sls. Mgr.
J. E. Sozinho, TBA Sls. Mgr.

■BELCHER OIL CO.—Listed under The Coastal Corp.

■BELL FUELS CORP.
31st & Grays Ferry Ave.
Philadelphia, PA 19146
Phone: (215) 336-5000

■BEST OIL
2939 Saw Mill Run Blvd.
Pittsburgh, PA 15227
Phone: (412) 884-8777
Key: M; Gr, Dr
Joseph J. McNally, Pres.
Harley W. Pratt, Exec. VP
Michael A. Martin, Mktg. VP

■BI-RITE OIL CO.
500 Penn Center Blvd.
Pittsburgh, PA 15235
Phone: (412) 243-7550
Key: M; G-Texaco, F-Texaco, L
J. Neil Scholl, Chief Executive Officer
Arthur J. Sciullo, Vice Chmn.
Joseph R. Sepesy, Exec. VP
Peg Bowser, Off. Mgr.
Ken Huselton, Marketing VP
Clyde Hanyak, Adv. Mgr.
H. J. Ruggiero & R. J. Steinmiller, Opns. Mgr's.

■BORON OIL CO.—Sub. of Standard Oil Co. (Ohio)

■BOSWELL OIL CO.
2504 Central Trust Tower
Cincinnati, Ohio 45202
Phone: (513) 421-1200
Key: M: Gw, Fw, Dw, Lw
Wm. P. Boswell, Chmn.
W. Luke Boswell, Pres.
C. D. Mayer, Sr. VP
R. P. Fedirka, Admin. VP

■BRAY TERMINALS
River Road
Marcy, NY 13403
Phone: (518) 793-8828
Key: T-M; G-Citgo; G, D, F, I
Subs: Bray Industries, Inc.
  Buy Gasohol, Inc.; Petroleum Action, Inc.
Dana S. Bray, Jr., Pres. & CEO
Larry N. King, VP Controller
Lawrence A. LeLuca, Mktg. VP
Charles Newell, Opns. Mgr.
Virginia Cappola, VP Supply & Distrib.

■BRENNAN PETROLEUM
202 E. Southern Ave.
Mesa, AZ 85202
Phone: (602) 833-7261
Key: M; Gr
Ted P. Brennan, Pres.
Tim Brennan, Exec. VP

■BROADWAY PETROLEUM CORP.—Sub. of Atlantic Richfield

■BROWNING OIL CO.
Louisville Rd.
Bowling Green, KY 42101
Phone: (502) 782-2454
Key: M-Shell; G, D, L
David Browning, Pres.

■BUCKEYE PETRO FUELS CO.
4025 Pottsville Pike
Reading, PA 19605
(215) 929-9468
Key: M; G, F, D, L
Sub. of Buckeye Fuels Co.
Subs: D. J. Witman Co.
  Remington Oil Co.
  Gilbert Bros., Johnston, PA
  Service Oil of Somerset, PA
  Oil Products of Pittsburgh
  Agway of Washington, PA
  R. E. Miller Oil Co., Palmyra, PA
  Goshert Quality Fuels, Reading, PA
James Bertelsmeyer, Pres.
Jack Mirly, VP
Bob Lisk, Gen. Mgr.

■BULK SALES CORP.
45 Rt. 206 South
Somerville, NJ 08876
Phone: (201) 722-[illegible]07
Key: M; Gw, Fw, Dw
Mark Baldinger, Pres.
Paul Baldinger, CEO
Fred Umar, Sls. Mgr.

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale, retail
F	Fuel Oil, wholesale, retail
D	Diesel, wholesale, retail
LPG	Liquefied petroleum gas wholesale, retail
L	Lubricants, wholesale, retail
w	wholesale only
r	retail only

■**BURMAH-CASTROL, INC.**
401 Hackensack Ave.
Hackensack, NJ 07601
Phone: (201) 488-1080
Key: T, M, L
Sub. of Burmah Oil Co.
Martin J. Donahue, Pres.
Thomas R. Crane Jr., Exec. VP
R. Fenster, Dir. of Mktg.
J. Gardella, Gen. Sls. Mgr.

Northeast Reg.
487 Edward H. Ross Dr.
Elywood Pk, NJ
(201) 797-5800
Bob Celia, Northeast Reg. Mgr.

Southeast Reg.
565 Henderson Rd.
Jacksonville, FL 32205
Phone: (904) 781-4661
Ted Binns, Southeast Reg. Mgr.

Midwest Reg.
6803 W. 64th St., Suite 226
Overland Park, KS 66202
W. P. Holladay, Midwest Reg. Mgr.

Western Reg.
12250 Industry St.
Bldg. 25
Garden Grove, CA 92641
Phone: (714) 891-2371
Ron DeBartolomeis, Western Reg. Mgr.

■**BURSAW OIL CORP.**
27 Cherry St.
Danvers, MA 01923
Phone: (617) 777-0700
Key: M-Texaco, Amoco, G, D, Fr, L
Sub. Enon Enterprises, Inc.
Seacoast Petroleum, Inc.
Wm. J. Bursaw, Jr., Pres.
R. William Coletti, Gen. Sls. Mgr.

■**BY-LO OIL CO.**
P. O. Box 771
Port Huron, MI 48060
Phone: (313) 982-1450
Key: T-M, G, D, F, L
C. S. Lawrence, Pres. & CEO
Craig A. Lawrence, VP Finance
Charles U. Lawrence, Mktg. VP

■**BY-RITE OIL CO.**
8125 Telegraph Rd.
Dearborn Hts, MI 48181
(313) 562-5520
Key: M, G, D
N. G. Philpott, Pres.

■**C.S.C. OIL CO.**
Div. of Cook United, Inc.
1407 West Jefferson St.
Louisville, KY 40203
Phone: (502) 589-5357
Key: M; G, D, F
Richard Pouliot, Pres.
W. G. Shepard, Gen. Mgr.
Robert Incorvia, Controller
Robt. A. Williams, Southern Div. Mgr.
Stan Bobowicz, Northern Div. Mgr.
Billy Cravens, Maint. Supv.

■**CALUMET REFINING CO.**
Div. of Calumet Industries
14000 Mackinaw
Chicago, IL 60633
Phone: (312) 928-4713
Key: I; Dw, Fw, Lw
Mark S. Salvino, Pres.
Philip Campbell, Gen. Sls. Mgr.

■**CAMPBELL OIL CO.**
P. O. Box 558
Massillon, OH 44648
Phone: (216) 833-8555
Key: M, G-Shell, Sunoco, D, F-Sunoco, L
C. K. Campbell, Pres.
Jack E. Decker, Exec. VP
Dan Phillips, VP

■**CANNON OIL CORP.**
P.O. Drawer 1850
Dothan, AL 36302
Phone: (205) 794-2776
Key: T, R-M, G, D
Vernon L. Cannon, Pres. & CEO
Danny Grable, Gen. Sls. Mgr.
Joe Cannon, Mgr. Whlsl. Sls.
Bobby Joe Gamble, Trans. Mgr.
Glenda Williams, Sec.

■**CARBO INDUSTRIES**
One Bay Blvd.
Lawrence, L. I., NY 11559
Phone: (516) 239-2500
Key: M, F
Subs: Gibraltar Oil
Hempstead Utilities
Triboro Fuel Oil
Jacob Hochhauser, Bd. Chm.
Paul Hochhauser, Pres. & CEO
James Grimaldi, Mktg. Sls. Mgr.
David Ploth, Equip. Sls. Mgr.

Gibraltar Oil Co.
4060 Austin Blvd.
Island Park, NY 11558
Phone: (516) 889-8000

■**CARDON OIL CORP.**
1837 E. 3rd St.
Tempe, AZ 85281
Phone: (602) 967-7691
Key: T, M, Gw, Gr, Dr, Lw
Subs: Short Stop Markets
Sunshine Truckstops
Fast Gas
Filler Fast Fuels
Wilford Cardon, Pres. & CEO
Elijah Cardon, Sec. Treas.
Terry Trendler, VP Mktg.
Bruce Holbrook, Gen. Sls. Mgr.
Loren Rohner, Supply Coord.
Rick Lane, Merch. Coord.
Greg Cardon, Exec. VP

■**CEL OIL PRODUCTS CORP.**
5402 Dutton Ave.
P. O. Box 5123
N. Charleston, SC 29406
Phone: (803) 744-2525
Key: T, M; G-Cel, Gas-Up, D, F-Cel, Gas-Up
Sub: Gas-Up Inc.
T. H. Albenesius, Jr., Pres.
T. H. Albenesius III, Exec. VP

■**CENTER INDEPENDENT OIL CO.**
R.D. 1
Smock, PA 15480
Phone: (412) 677-4408
Key: M; G, F, L
John R. Higinbotham, Pres.
A. D. Higinbotham, Exec. VP
Glenn Knox, Gen. Sls. Mgr.
Delores Moser, Fuel Oil Mgr.
Sophie Capan, Credit Mgr.

■**CENTRAL PETROLEUM CO.**
548 Standard Bldg.
Cleveland, OH 44113
Phone: (216) 771-0400
Key: M; L
Div. of Wyle Laboratories
Sub: Topsail Lubricants
P. T. Webster, Pres.
C. L. Webster, Gen. Mgr.
L. D. Powers, Farm Sls. Mgr.
William Winchester, Mktg. Mgr.
P. T. Webster, Jr., Lubrication Engr.

■**CENTURY HULBURT, INC.**
2140 S. 88th
Kansas City, KS
Phone: (800) 225-4107
Key: O; Lw
Sub. of: Century Oils International
H. A. (Tuffy) Mayor, III, Pres. & CEO
L. W. Okon, VP Tech.
Kelly G. Kaphart, VP

■**CENTURY REFINING CO.**
P. O. Box 1197
Kansas City, MO 64141
Phone: (816) 968-2900
Sub. of Anadarko Production Co., a Panhandle Eastern Co.
Key: M; Gw, LPGw
W. R. Kesler, Pres.
A. L. Beckner, VP
W. D. Hughes, VP

■**CERTIFIED OIL CO.**
303 S. Front St.
Columbus, OH 43215
Phone: (614) 224-3175
Key: M; G, D, F
C. M. Baker, CEO
Dean Walcutt, Pres.
W. J. Allison, Exec. VP

■**CHAMPLIN PETROLEUM CO.**
Box 7
Fort Worth, TX 76101-0007
Phone: (817) 877-6000
Key: R-M; Gw, Fw, Dw, LPGw
Sub. of Union Pacific Corp.
Sub. Harbor Service Stations, Inc.
W. L. Adams, Pres.
L. W. Marshall, Sr. VP, Manuf. and Mktg.
R. R. Morgan, Gen. Mgr., Mktg.
K. R. Richardson, Mgr., Mkt. Devel.
D. R. Gray, Mgr., Private Brand Mktg.
K. E. Dainton, Mgr., Bulk Sls.
K. M. Jahnke, Mgr., Prod. Supply and Distrib.
S. M. Fuller, Mgr., Prod. Supply
L. B. LeFevre, Jr., Mgr., Prod. Distrib.
R. M. Vecchio, Mgr., Mktg., Plng. & Analysis
M. L. Bowles, Mgr., Pricing & Special Prod. Mktg.
R. D. Admire, Mgr., Prod. Pricing
E. A. Kerber, Mgr., Special Prod. & Indus. Sls.

West Coast Marketing
Champlin Petroleum Company
P.O. Box 920
Long Beach, CA 90801
Phone: (213) 436-4261
W. A. Howiler, Mgr., Supply Distrib. & Mktg.
M. R. Callahan, Mgr., Prod. Sls. & Supply

■**CHAPMAN, INC.**
P. O. Box 1298
Sherman, TX 75090
Phone: (214) 893-8106
Key: M, G-Texaco
Ellis L. Olmstead, Pres.

■**CHARTER MARKETING CO.**
P.O. Box 4726
Jacksonville, FL 32232
Phone: (904) 358-4111
Key: I; G, D, F
Subsidiary of The Charter Co.
Subsidiaries:
Northeast Petroleum Industries
Charter Crude Oil Co.
Charter International Oil Co.
Charter Marketing Co.
Charter Oil (Bahamas) Ltd.
Riffe Petroleum Co.
New England Petroleum Corp.
J. F. Leonardo, Pres.
J. C. Thompson, VP Opns.
A. L. Cahoon, VP Controller
R. R. Johnson, VP Mktg.
W. R. Booth, VP Trans.
W. G. Schwind, VP Prod. Devel.

Northeast Petroleum Industries
295 Eastern Avenue
Chelsea, MA 02150
Phone: (617) 884-7570
Joseph R. DeStefano, Pres.

Charter Crude Oil Co.
8441 Gulf Freeway
Houston, TX 77017
Phone: (713) 643-5555
Larry J. Golden, Pres.
Gabriel E. Kaspar, Trading VP

Charter International Oil Co.
8441 Gulf Freeway
Houston, TX 77017
Phone: (713) 640-4700
Michael E. Crismon, Pres.
Ray Glasscock, Sr. VP—Manuf.
B. F. Stanley, Sr. VP—Trans.
G. Richard Boyle, Sr. VP—Adm.

New England Petroleum Corp.
P.O. Box 2017
Jacksonville, FL 32202
Phone: (904) 358-4426
Richard J. Bastien, Pres.
Charles A. Kroetz, Sr. VP—Mktg.
James F. Easterlin, Sr. VP—Sup. & Distrib.

Riffe Petroleum Co.
P.O. Box 2017
Jacksonville, FL 32202
Phone: (904) 358-4069
H. B. Horner, Pres.

■**CHEKER OIL CO.**
P. O. Box 162
Hazel Crest, IL 60429
Phone: (312) 335-0600
Key: M, G, D
L. W. Cochran, Pres.
M. E. Mittleman, VP Mktg.
H. A. Forshaw, VP Eng.
E. J. Garneau, VP Fin.

■**CHEVRON CANADA LTD.**
1500-1050 W. Pender St.
Vancouver, B.C. V6E3T4
Phone: (604) 668-5300
J. P. McIntyre, Pres.
D. R. Kestell, VP Mktg.
J. D. McMaster, VP, Finance
D. W. Reed, VP Mfg. & Ref. Mgr.

■**CHEVRON U.S.A.**—Listed under Standard Oil Co. of Calif.

■**W. R. CHILDRESS OIL CO.**
2729 N.E. 28th St.
Fort Worth, TX 76111
Phone: (817) 834-1901
Key: M, G-Shamrock, Phillips, D
W. R. Childress, Jr., Pres.
David Woods, VP Opns & Sls.
Angelia Childress, VP Admin.

■**CHRISTENSEN OIL CO.**
P. O. Box 987
Green Bay, WI 54301
Phone: (414) 437-3257
Key: M; G, D, F
Herb E. Hoeft, Pres.

■**CIBRO SALES CORP.**
1040 East 149th St.
Bronx, NY 10455
Phone: (212) 585-0600
Key: R-M; G, D, F, L
P. James Massa, Pres. & CEO
Peter Cirillo, Secy.
John Cirillo, Treas.
Nicholas W. Cirillo, Exec. VP
William V. Cirillo, VP
F. Candreva, Mgr., Supply & Opns.
G. A. Shaw, Supvr., Marine Opns.
C. Sweet, Mgr., Retail Sls.
L. Vario, Mgr., Wholesale Sls.
J. Klopstoc, Regl. Mgr., Albany
Don Sanders, Plant Mgr., Albany
P. Gladis, Gen. Mgr., Philadelphia
F. Saccio, Gen. Mgr., L. I.
G. Vavoulis, Gen. Mgr., S&D
R. J. Zinser, Mgr. Trading
G. Schiesser, Mgr. Trading

■**CIBRO PETROLEUM**
Port of Albany
Albany, NY 12202
(518) 462-4237

■**THE CIRCLE K CORP.**
4500 S. 40th St.
P. O. Box 20230
Phoenix, AZ 85036
Phone: (602) 437-0600
Key: M; Gr-Aero, Lr, Dr
Karl Eller, Chmn.
Bob Hutchinson, Pres. Circle K Corp.
Jim Wiliamson, Pres. Circle K Convenience Stores, Inc.
Robert Burns, Sr. VP Gasoline Opns.
John Clark, Mktg. Mgr.
Mike Sroda, Gasoline Supply & Distrib. Mgr.

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale, retail
F	Fuel Oil, wholesale, retail
D	Diesel, wholesale, retail
LPG	Liquefied petroleum gas wholesale, retail
L	Lubricants, wholesale, retail
w	wholesale only
r	retail only

■CITGO PETROLEUM CORP.
Box 3758
Tulsa, OK 74102
(918) 495-4000
Key: T, R-M; G, F, D, LPGw, L
Sub. of The Southland Corp.
Subs.: Citgo Pipeline Co.
Citgo Pipeline Investment Co.
Citgo Caribbean Corp.
Citgo International Supply Co.
Citgo International Trading Co.
S. J. Susser, Pres.
M. A. Johnson, Sr. VP Corp. Opns. & Planning
J. H. Dewell, Sr. VP Mktg & Supply
M. J. Sedlacek, VP Wholesale Mktg.
M. K. Roemer, VP Store Opns.
S. R. Berlin, Gen. Mgr. Fin. Svcs.
D. A. Wilson, Gen. Mgr. Trans. Group

■COAST OIL CO.
4250 Williams Rd.
San Jose, CA 95129
Phone: (408) 252-7720
Key: M-Texaco-Arco-Independent; G, D, F, L
Subs: Barkow Petroleum Co.
Mission Trail Oil Co.
Richard Distributors, Inc.
Coast Stations, Inc.
M. T. Transportation Co.
Norcal Petroleum Co.
Herbert F. Richards, Pres.
Royce Andrews, VP Whsl. Sls.
Jerry Cummings, VP Retail Sls.
Jack Kloster, Controller
Judi Nauman, Credit Mgr.

■THE COASTAL CORP.
9 Greenway Plaza
Houston, TX 77046
Phone: (713) 877-1400
Key: I; G, F, D, LPG, L
Subs. include
Coastal States Marketing Co.
Derby Refining Co.
Colorado Interstate Corp.
Cosbel Petroleum Co. (The Belcher Companies)
O. S. Wyatt, Jr., Chmn & CEO
H. L. Blomquist, Jr., Pres
F. M. Otto, Sr. Exec. VP
J. R. Paul, Exec. VP
J. B. McElreath, Sr. VP, Acctng. & Contr.
K. O. Johnson, Corp. Sr. VP, & Chmn. Belcher Oil Co.
G. L. Brundrett, Jr., Sr. VP, Legal, & Gen. Counsel
M. P. Aquilina, Sr. VP Ref. & Mktg. Opns., West Coast
A. J. Gilbreath, Sr. VP Supply & Trans., West Coast
D. J. Hill, Sr. VP, Ref. & Mktg. Opns., Gulf Coast
P. J. King, Jr., Sr. VP & Pres., Colorado Interstate Gas Co.
W. E. Spencer, Sr. VP, Explo. & Prod.
B. W. Schrader, Sr. VP & Deputy Gen. Counsel
A. W. Smith, Sr. Pres., Belcher Oil Co.
L. C. Smith, Sr. VP Coal & Chem.
S. F. Willson, Jr., Sr. VP Corp. Sup. & Trans.

Coastal States Marketing
9 Greenway Plaza
Houston, TX 77046
Phone: (713) 877-1400
Key: T-R-M; Gw, Dw, Fw, LPGw
H. L. Blomquist, Jr., Pres.
F. G. Otto, Sr. VP

Eastern Reg. Sls. Off.
56 Dundee Ct.
Mahwah, NJ 07430
Phone: (201) 529-1646
C. R. Romer, Jr., Mgr., Refd. Prods.

Derby Refining Co.
P. O. Box 1030
Wichita, KS 26701
Phone: (316) 267-0361
Key: Prod.-R-M; G, D, Fw
R. J. Johnston—Pres.
R. H. Meadows, VP Crude, Prod. Supply & Pipeline
R. E. Drevo, VP Whsle. Mktg.
W. W. Lee, Controller
M. D. Taylor, VP Retail Mktg.
M. D. Tindall, VP, Mktg. Svcs.
R. G. Casteel, VP Refining
O. L. Foster, Jr., VP Communications
W. L. Caldwell, Coord. Mfg. & Mktg.
R. F. Doyle, Mgr., Retail Sls.
W. R. King, Mgr., Real Estate
W. R. Decker, Mgr., Lube Oils, Tech. Sls. & Svcs.
Leo Carmen, Credit Mgr.

Pacific Refining Co.
9 Greenway Plaza
Houston, TX 77046
Phone: (713) 877-1400
Key: R-M; Gw, Dw, Fw
F. M. Otto, Chmn, CEO & Pres.
M. P. Aquilina, Sr. VP Ref. & Mktg. Opns., West Coast

Long Beach Office
180 Ocean Blvd., Suite 800
Long Beach, CA 90802
Phone: (415) 799-6600
M. P. Aquilina, Sr. VP Ref. & Mktg. Opns., West Coast
A. L. Gualtieri, Gen. Mgr. (Hercules, CA)

Belcher Oil Co.
P. O. Box 525500
Miami, FL 33152
Phone: (305) 551-5200
Key: T-M; Dw, Fw, LPGw, Lw
Kenneth O. Johnson, Chmn. & CEO
A. W. Smith, Pres.
J. F. Roehl, Jr., Sr. VP, Mktg.
J. Anthony Belcher, Jr., VP, Marine Fuel Sls.
D. Wayne Carlton, VP, Gulf Coast Reg.
Ray W. McKewon, VP, Mid-South Reg.
C. H. Leach, Jr., VP Supply
E. J. Travers, VP Opns.

Belcher Co. of New York, Inc.
48-02 54th Ave.
Maspeth, NY 11378
Phone: (212) 392-6700
Key: M; D, F
Arthur T. Soule, Pres. & CEO
Roy Miller, Mktg. VP
T. W. Costikyan, VP, Supply & Distrib.
F. F. Goebel, VP Opns. & Engrg.

The Belcher Co. of Tennessee, Inc.
8700 W. Flagler St.
Miami, FL 33174
Phone: (305) 551-5200
K. O. Johnson, Pres. & CEO
J. F. Roehl, Jr., Sr. VP

Belcher New England
222 Lee Burbank Hwy.
Revere, MA 02151
Phone: (617) 284-4490
Key: M; Gw, Dw, F
A. T. Soule, Pres.
W. D. Berberich, Exec. VP
Frederick W. Taubert, Sr. Mktg. VP
T. W. Costikyan, VP, Supply
Frederick L. Forest, Asst. VP, Supply & Distrib.
Frederick F. Goebel, VP, Opns. & Engrg.
William J. Bain, VP, Hvy. Oil Sls.

Belcher New Jersey, Inc.
Foot of E. 6th St.
Bayonne, NJ 07002
Phone: (201) 437-2100
A. T. Soule, Pres.
W. D. Berberich, Exec. VP

■COEN OIL CO.
2207 Kimball Rd., S.E.
Canton, OH 44711
Phone: (216) 452-7944
Key: M-Amoco; G-Amoco, Union, Mobil, Shell, D, F-Amoco, L
Carlton B. Coen, Pres.
Charles R. Coen, Exec. VP
Donald C. Coen, VP, Mktg.
Ralph Kelly, Gen. Sls. Mgr.

■COLONIAL OIL INDUSTRIES
Box 576
N. Lathrop Ave.
Savannah, GA 31402
Phone: (912) 236-1331
Key: T, M, O; G, F, L, D
Subs: Interstate Stations, Inc.
Colonial Interstate, Inc.
Chatham Towing Co., Inc.
Colonial Terminals, Inc.
Robert H. Demere, Pres.
B. E. Leigh, VP & Treas.
Robert H. Demere Jr., VP
S. B. Wimbish Jr., VP Sls.
W. A. Baker Jr., Asst. VP Opns.
Andrew J. Cobb, Asst. VP, Retail Fuel Oil
G. Herbert Griffin Jr., Secty. & Credit Mgr.
Raymond S. Demere, Retail Sls. Mgr.
Robert W. Jarrell, Storage Sls. Mgr.

■COMET OIL CO.
P. O. Box 22033
Savannah, GA 31403
Phone: (912) 234-5396
Key: M; Gr
W. A. Winburn III, Pres.
W. A. Winburn IV, Sec. Treas.

■COMMONWEALTH OIL REF. CO. INC.
4005 Broadway
San Antonio, TX 78209
Phone: (512) 828-8444
Key: O; Gw, Fw, Dw, LPGw, Lw
Stanford N. Phelps, Chmn.
Robert Dieppa, VP Mfg.
Christopher Whyte, VP Fin.
Edward D. Doherty, Pres. CEO

■COMO OIL CO.
749 E. Superior St.
Duluth, MN 55802
Phone: (218) 722-6666
Key: M-Phillips, G, D, F, LPG, L
Subs: Como Gas Sales
Como Tire & Battery
Myles Hall, Pres.
Gerald Sher, VP
Larry Everett, LPG Mgr.
L. H. Brown, Treas.
Robert Hall, Secy.

■COMO OIL CO.
2203 W. McNab Rd.
Pompano, FL 33060
Phone: (305) 972-3820
(305) 945-3820
Key: M-Phillips; G, D, F, L
Wm. Call, Exec. VP
D. L. Miller, VP
Jerry Barber, Gen. Mgr.

■CONNA CORP.
981 S. Third St.
Louisville, KY 40203
Phone: (502) 584-1281
Key: M, G, Dr
Subs: Remote Services, Inc.
Convenient Industries of America
Joe P. Peden, Chmn., Pres. & CEO
Robert T. Johnson, Exec. VP

Remote Services, Inc.
P. O. Box 35580
981 S. Third St.
Louisville, KY 40232
Phone: (502) 584-3247
Key: M, Gr, Dr, Fr
Subs: Convenient Gasoline, Inc. (NY)
Petco Oil Co.
J. P. Peden, CEO, Chmn., Pres.
G. E. Wagner, Pres.
C. A. Reinhardt, N. Reg. Sls. Mgr.
William L. Jessie, S. Reg. Sls. Mgr.
M. S. Winner, Opns. Mgr.
Sally R. Brady, Mgr. Supply & Distrib.

Convenient Industries of America
981 S. Third St.
Louisville, KY 40203
Phone: (502) 584-1281
Robert T. Johnson, Pres.

■CONOCO, INC.
(Corporate Offices)
Du Pont Building
1007 Market Street
Wilmington, DE 19898
Phone: (302) 594-3400
Sub. of E.I. Du Pont de Nemours & Co.
Ralph E. Bailey, Chmn. & CEO

Conoco Petroleum Operations
5 Greenway Plaza East
P.O. Box 2197
Houston, TX 77252
Phone: (713) 965-1000
Key: I, G, D, F, LPG, L
Subs: Kayo Oil Co.
Douglas Oil Co. of Calif.
C. S. Nicandros, Pres.
E. J. Grivetti, Exec. VP Explor. & Prod.
D. R. Clark, Exec. VP Petro. Prod.
O. Newell, Jr., Exec. VP Mfg. Tech.

Conoco Division Operations
C. P. McCahill, Gen. Mgr.
W. E. Eldred, Mgr., Adv. Mdsg.
E. L. Saul, Coord., Distrib. Rel.

Northern Marketing Div.
Corporate Woods
10890 Benson
Overland Park, KS 66210
Phone: (913) 341-2800
R. C. Hager, Div. Mgr.

Southern Marketing Div.
Lincoln 10 Bldg.
P.O. Box 2197
Houston, TX 77252
Phone: (713) 492-3100
C. R. Shuttlesworth, Div. Mgr.

Western Marketing Div.
Orchard Place 4
5990 S. Syracuse St.
Englewood, CO 80111
Phone: (303) 740-6347
J. P. O'Brien, Div. Mgr.

Kayo Oil Co.
1221 East Main St.
Chattanooga, TN 37408
Phone: (615) 756-5770
F. B. Ehrhardt, Pres.
R. L. Fulcher, VP, Corp. Affairs
R. A. Pierce, VP, Opns.
J. S. Hill, VP, Svcs.

Wholesale & Commercial Opns.
E. C. Fenton, Jr., Gen. Mgr.
J. T. Barron, Div. Mgr., Trans. Sls.
V. E. Flinn, Div. Mgr. Asphalt & Resid
C. W. Mussler, Div. Mgr. Lubes
B. C. Striegler, Mgr. Tech. Svcs.
D. R. Sain, Mgr., Lube Opns. & Auto Lubes
R. L. Nohr, Mgr., Indus. Sls.
H. P. Dodson, Div. Mgr., Resellers

■CONSUMERS GASOLINE STATIONS
P.O. Box 23309
Nashville, TN 37202
Phone: (615) 259-3226
Key: M; Gr, Dr, Lr
W. F. Davidson, Pres.
L. C. Morris, VP

■CONSUMERS OIL CORP.
1473 Lamberton Rd.
Trenton, NJ 08607
Phone: (609) 394-8101
Key: M-Citgo-Chevron; Gr, D, F-Mobil, L
Sub: Hillman-Thompson Oil Corp.
Richard W. Fineburg, Pres.
Merton K. Goodall, Jr., VP
S. M. Morris, Sec. Treas.

■CONSUMERS OIL SERVICE
Paulsboro, NJ 08066
Phone: (609) 423-0010
Key: M; G, D, F, L
James D. Cameron, Pres.

■CONSUMERS PETROLEUM
808 Post Rd.
Fairfield, CT 06430
Phone: (203) 259-5291
Key: M; Gw-Texaco, Dw, Fw, LPGw, Lw
Ernest A. Wiehl, Jr., Pres.

■CONSUMERS PETROLEUM CO.
13507 Auburn
Detroit, MI 48223
Phone: (313) 272-3800
Key: M; G, F, D, L
William Feldman, Pres.
Frank J. Carroll, Sec. Treas.
Bruce Butzier, Gen. Sls. Mgr.

■CONVENIENT INDUSTRIES OF AMERICA—(See Conna Corp.)

■COOK & COOLEY, INC.
1701 W. Wardlow Rd.
Long Beach, CA 90810
Phone: (213) 775-7361
Key: M, G-Texaco, D, Fw, L
Robt. T. Bodamer, Pres. & CEO
Thomas E. Bodamer, Exec. VP
Jack Reed, Gen. Sls. Mgr.
Sylvia M. Bodamer, Adv. Mgr.

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale, retail
F	Fuel Oil, wholesale, retail
D	Diesel, wholesale, retail
LPG	Liquefied petroleum gas wholesale, retail
L	Lubricants, wholesale, retail
w	wholesale only
r	retail only

■CORAL RIDGE CORP.
10615 National Turnpike
Fairdale, KY 40118
Phone: (502) 366-1935
Key: M; Gr. Fr. Dr. LPGr. Lr
B. G. Broadhurst, Pres.
Billie Jean Broadhurst, VP

■CORY'S GASOLINE STATIONS
Box 1412
Mesa, AZ 85201
Phone: (602) 253-8275
Key: T. M; G. Fw. D. LPGw. Lw
Phil Cory, Pres.
Roxana Harvey, Sec. Treas.
Don Clark, Mgr. Trans.

■CROCKETT OIL CO.
P.O. Box 728
1011 Empire
Joplin, MO 64802
Phone: (417) 624-2311
Key: M Conoco; Apco; Mobil; Sun G. D. F. L
B. F. Hamilton, CEO & Exec. VP
D. L. Crockett, Pres.

■CROWN CENTRAL PETROLEUM CORP.
One North Charles St.
P.O. Box 1168
Baltimore, MD 21203
Phone: (301) 539-7400
Key: I; G. D. LPGw. L
Henry A. Rosenberg, Jr., Chmn. & CEO
G. W. Jandacek, Pres. & Chief Opg. Off.
W. M. Ginder, Exec. VP
John Wood, Grp. VP
G. L. Shaw, VP Mktg.
J. P. Candella, Ret. Mktg. Mgr.
L. B. Raborn, Whsle. Mktg. Mgr.
M. S. Koethcke, Mktg. Adm. Mgr.
J. H. McNulty, North Reg. Sls. Mgr.
B. T. Boshell, Sov. Reg. Sls. Mgr.
A. M. deLange, Opns. & Devel. Mgr.
R. H. Hemphill, Mktg. Svcs. Mgr.
H. H. Crossan, R.E. Mgr.
J. C. Corcoran, Prcg. & Alloc. Mgr.

■CRYSTAL FLASH PETROLEUM CORP.
P.O. Box 684
Indianapolis, IN 46206
Phone: (317) 872-4163
Key: M; Gr. Dr. Fr. Lr
Sub: Michigan Crystal Flash Petroleum Corp.
Mac Fehsenfeld, Pres.
F. M. Fehsenfeld, VP
Frank Fehsenfeld, Sec. & Chmn.

■CRYSTAL PETROLEUM CO.
P.O. Box 4180
4041 Agnes
Corpus Christi, TX 78408
Phone: (512) 883-6574
Key: T-M, G-Shell, D. L
Sub: Gandy-Robertson, Inc.
C. A. Robertson, Jr., Pres.
R. M. Carroll, Mgr., Gen. Sls.

■CRYSTAL REFINING CO.
801 N. Williams
Carson City, MI 48811
Phone: (517) 584-3157
Key: R-M; Gw. Fw
Marvin Fleischman, Pres.

■CRYSTAL PETROLEUM CO., INC.
P.O. Box 9128
Birmingham, AL 35213
Phone: (205) 870-8710
Key: M; G-Crystal, D
Sub. of Crystal U.S.A. Oil, Inc.
Joseph R. Saxon, Pres. & CEO
Bill F. Maddox, VP Mktg. & Food Stores
Linda Maddox, VP Acctg.
Kathy Lepper, Sec. VP

■CUMBERLAND OIL CO.
7260 Centennial Blvd.
Nashville, TN 37209
Phone: (615) 297-8531
Key: T. M. O; Gw. FDw. L
Sub-Distrib.: Dean Oil Co.
John F. Cummins, Pres.
Richard F. Cummins, VP & Gen. Mgr.
V. H. Hunnicutt, Sec.
S. C. Lockett, Mgr., Fuel Oil Sls.
D. V. Harrelson, Mgr., Indus. Oil Sls.
A. Humphrey, Retail Mgr.

■CUNNINGHAM OIL CO.
343 Carswell Ave.
Holly Hill, FL 32017
Phone: (904) 253-7621
Key: M; Gw. D. L
Lee C. Culler, Pres.
Jerry Olson, VP LPG. Div.
Bob Thurman, VP
Charlie Winkler, Secty. Treas.

■CURTIS PARKER OIL CO.
P.O. Box 6081
Shreveport, LA 71136-6081
(318) 868-2716
T. M; Gw. Fw. Dw. Lw
B. K. Eaves, Pres. & CEO
D. L. Moyer, TBA Mgr.
Hollis Coe, Opns. Mgr.
Clay G. Eaves, Svc. Sta. Supvr.

■CURT'S OIL CO.
Box 1759
Muskogee, OK 74401
Phone: (918) 682-7888
Key: T-M; G. L
Thurman Curtsinger, Pres. & CEO
Bob J. Curtsinger, Exec. VP
David Clark, VP

■D & W OIL CO.
14330 Wyoming
Detroit, MI 48238
(313) 834-3248
Key: M; F. D
Charlie F. White, Fnddr.
Charlie A. White, Gen. Mgr.
Larry E. Bigelow, VP

■K E DAVID LTD
443 Paxson Ave.
Glenside, PA 19038
Phone: (215) 886-8900
Key: M; G-Citgo, D. F. L
Ken David, CEO
Kenneth David, Pres.
Kent David, Exec. VP
Fred Casilo, VP Mktg.
Charles Kelb, Gen. Sls. Mgr.

■DAVIS-HOWLAND OIL CORP.
200 Anderson Ave.
Rochester, NY 14607
Phone: (716) 473-6650
Key: M, O; L
Sub: H & W Chemicals
Lawrence R. Klepper, Pres.
Harry J. Esposito, Gen. Sls. Mgr.
Robert R. Kiely, VP Opns.
Anne Vaughan, VP Pur.

■DEAD RIVER CO.
55 Broadway
Bangor, ME 04401
Phone: (207) 947-8641
Key: T-M; G. D. F. LPG. L
Subs: Scott Transportation Webber Tanks, Inc. (50% owned)
P. Andrew Nixon, Pres. & CEO
F. M. McClain, VP Petroleum
F. W. Wallace, Gen. Mgr.-Reg. 1
A. H. Walton, Gen. Mgr.-Reg. 2
W. R. Harmon, Prod. Procurement

■DEBLOIS OIL CO.
Colfax & Concord St.
Pawtucket, RI 02862
Phone: (401) 722-8000
Key: M-Texaco; G-Texaco, Sunoco D. LPG. L
Subs: Beacon Oil Co.
Mercury Supply Co.
Arthur J. De Blois, Jr., CEO
Robt. E. De Blois, Pres.
Charles H. De Blois, Exec. VP
Wendell P. Clare, Jr., VP, Comptroller
David J. Splaine, VP, Sls., Mktg.
Ralston Silva, VP Opns.
Bruce Smith, Fuel Sls. Mgr.
R. W. Josef, Gasoline Sls. Mgr.
Stanley Zuba, Credit Mgr.

■DESERT COUNTIES OIL CO.
750 Riverside Dr.
Barstow, CA 92311
Phone: (714) 256-8616
Key: T-M-Arco, G. D. L
Frank H. Greinke, CEO
Richard Becktel, Pres.
Donovan Greinke, Exec. VP

■DESERT OIL CO.
P.O. Box 609
Rock Springs, WY 82901
Phone: (307) 362-6611
Key: T. M; G. D. L
Sub.-Distrib.: Farson Service Pinedale Chevron
C. Keith West, Pres. & Chmn.
Charles K. West, II, Exec. VP, Whlsl. & Gen. Sls. Mgr.
Joe Legerski, Opns. Mgr.
Evan Williams, Trans. Mgr.
Zoanne Henderson, Credit Mgr.
Steven P. West, Mktg. VP, Retail

■DESERT PETROLEUM, INC.
P.O. Box 1601
Oxnard, CA 93032
(805) 485-0430
I; G. FW. D
Sub: Gasco Gasoline, Inc.
William E. Thompson, Pres.
Ben Larner, VP Supply and Mktg.
Mike Saliba, VP Raw Materials Supply
Robert van der Valk, Mgr. Supply & Mktg. (S. Dist.)
Patrick Barnecut, Mgr. Supply and Mktg. (N. Dist.)
Dean Jensen, VP Trans.
Gary Carson, VP Retail

■DIAMOND INDUSTRIES
A and Heald Sts.
P.O. Box 629
Wilmington, DE 19899
Phone: (215) 459-9105
Key: M; G. D. F
Subs: Altemos Fuel Oil Co., Allentown,
Diamond Management
Diamond Fuel Oil Co.
Diamond Petroleum Co.
Diamond Ice & Fuel Co.
Medford-Dunleavy, Inc.
Stanley W. Mann, Pres. & CEO
Louis Mancheria, Sr., VP
R. Gardner Kahoe, III, Esq., VP
R. T. Wright, VP, Admin.
Joseph Worrell, VP, Trans.
G. C. Engle, Sr. VP, Opns.

■DIAMOND SHAMROCK REFINING & MARKETING CO.
P.O. Box 20267
San Antonio, TX 78220
Phone: (512) 223-2631
Key: R-M; G. Fw. D. LPGw. L
Sub. of Diamond Shamrock Corp.
Subs: Sigmor Retail
Autotronic System, Inc.
Industrial Lubricants
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Dewey Mark, Exec. VP
Ed Prater, Manfg. Group
W. Klesse, VP Logistics & Strategy
Robert Farmer, VP Mktg. Group
Robert Heard, VP Whlsl. Mktg.
Tom Lyons, VP Retail Mktg., Autotronics
Joe Walden, VP Retail Mktg., Sigmor
Jim Jenkins, VP Industrial Lubricants
Lamar Simmons, Zone Mgr., Whlsl.
Hershel Sorrels, Zone Mgr., Whlsl.
Larry Johnson, Zone Mgr., Whlsl.
Ken Eaton, Zone Mgr. Retail
John McPherson, Zone Mgr. Retail
G. Mayberry, Eastern Div. Mgr. Retail
G. Jordan, Western Div. Mgr. Retail
W. Hilbert, Mgr. Industrial Sls.
Dan Engler, Mgr. Commercial Consumer Sls.
Mike Russell, Mgr. Merchandising & Prom.
Gene Smith, Mgr. Jobber Communications

■DICKEY, INC.
Packwood, IA 52580
Phone: (319) 695-5401, 800-452-1011, 800-247-1081
Key: T-M G. D. F. L
Subs: Dickey Distributing
Harold Dickey Transport
Doug Dickey, Pres.
Harold Dickey, Exec. VP
Dave Dickey, VP Mktg.
Dan Dickey, Gen. Sls. Mgr.
Deb Bemis, Sec. Treas.

■DIXIE OIL CO.
Rt. 5, P.O. Box 1007
Tifton, GA 31793
Phone: (912) 382-2700
Key: T-M; G. D
Bobby B. Lindsey, Pres. & Chief Exec. Off., Sls. Mgr.
Rheudean Denby, Exec. VP
W. F. Lindsey, Chmn. Brd.

■DRAKE'S REFINING STATION
P.O. Box 13129
Lansing, MI 48901
Phone: (517) 394-6747
Key: M; G. D
E. T. Dennis, CEO
E. T. Dennis III, Pres.

■EAST COAST OIL CORP.
1420 Commerce Rd.
Richmond, VA 23224
Phone: (804) 232-2373
Key: M; Gr. Dr. Fr
T. N. Allen, Pres.
J. M. Steele, Sr. VP & Gen. Mgr.

■EDDY REFINING CO.
Box 185
Houston, TX 77001
Phone: (713) 928-3281
Key: R-M; Gw. Dw. Fw
E. C. Scurlock, Pres. & CEO
W. L. Adkins, VP Treas.

■EDGINGTON OIL CO.
2400 E. Artesia Blvd.
Long Beach, CA 90805
Phone: (213) 636-2524, (213) 423-1465
Key: R-M; Gw. Fw. Dw. Lw
Sub of Triad America Corp.
Subs: Sahuaro Petroleum & Asphalt Co.
Mark G. Newgard, Pres.
Arch H. Humphrey, VP & CEO
Martin S. Simon, Exec. VP Manuf. & Asphalt Mktg.
Al L. Siegner, VP Supply & Trading
Richard F. Kent, VP Prod.

■ELM CITY FILLING STATIONS
P.O. Box 9715
New Haven, CT 06513
Phone: (203) 624-5137
Key: M; F. D
S. J. Horton, Pres.

■ENGLEFIELD OIL CO.
447 James Pkwy.
Newark, OH 43055
Phone: (614) 928-8215
Key: M; G. F. D. L
Subs: Oil Service Corp.
River Oil Co.
Freight Sales
Morral Oil Co.
F. W. Englefield, CEO
James M. Kennedy, Pres.
F. W. Englefield IV, VP
Benjamin Englefield, VP Trans/Supply
Ed Stephens, VP Mktg.
F. McManus, VP Whlsl. Sls.
Fred Kaseman, Chief Accountant

■ERGON, INC.
Pearl at Lamar
P.O. Drawer 1639
Jackson, MS 39205
Phone: (601) 948-3472
Key: I; Dw. Fw. LPG. L
Subs: Lampton Love
Ergon Refining Co.
Ergon Exploration Co.
L. B. Lampt[illegible] Ch & Pres.
H. D. Owen, Exec. VP
R. F. Cox, Sr. VP, Exploration
George D. Ishee, Sr. VP Crude
L. B. Lampton Jr., VP Retail Sls.
Lee C. Lampton, VP, Whlsl. Sls.
J. Everett, Area Sls. Mgr.

Product Terminals:
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Phone: (615) 266-6723

Greenville, MS 38701
Phone: (601) 332-4849

Memphis, TN 38113
Phone: (901) 775-1247
Wm. Baker, Area Sls. Mgr.

Mobile, AL 36601
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Key: T-M; Gr
Alfred W. Erickson, Pres.
Ronald A. Erickson, Exec. VP
Dick Mills, VP, Sup. & Distrib.

■**ESSO PETROLEUM CANADA**
55 St. Claire Ave. West
Toronto, Ontario, Canada M5W 2J8
Phone: (416) 968-4111
Key: I; G, F, D, LPG, L
Sub of Imperial Oil Ltd. (Exxon Corp.)
D. K. McIvor, CEO Imperial Oil
A. R. Haynes, Pres. Imperial Oil
G. H. Thomson, Pres. Esso Petroleum
D. R. Purdie, VP Mktg.

■**ESTE OILS CO.**
5556 Vine St.
Cincinnati, OH 45217
Phone: (513) 242-5300
Key: M; G, F, L
Sub: McCoy Oil Co.
Albers Oil Co.
August J. Albers, CEO
Joseph R. Albers, Pres.
Andrew Brickweg, Exec. VP
Ken Smith, VP, Mktg.
Mike Riehemann, Gen. Sls. Mgr.

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1251 Ave. of the Americas
New York, NY 10020
Phone: (212) 398-3000
C. C. Garvin, Jr., Chmn. & CEO
H. C. Kauffmann, Pres.
R. H. Beresford, VP, Petrol. Prod. Dept.
D. L. Hamilton, Dep. Mgr., Petro. Prod. Dept.

Exxon Co., USA
Box 2180
Houston, TX 77001
Phone: (713) 656-3636
Key: I; G, D, F, LPGw, L
Randall Meyer, Pres.
E. J. Hess, Sr. VP
R. C. Kiddoo, Mktg. VP
R. T. Harvin, Whlsl. & Ind. Bus. Mgr.
S. M. Pearman, Retail Bus. Mgr.
J. R. Allred, Coordn. & Plnng. Mgr.
F. J. Lugar, Mktg. Admin. Mgr.
C. B. Raglin, Distrib. & Engr. Mgr.
P. P. Pierce, III, Bus. Devel. & Anal. Mgr.
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W. L. Huff, Nat'l. Accts. Sls. Mgr.
J. L. Stanislaus, TBA, Prod. Mgr.

Northeastern Reg. (Retail)
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Norwalk, CT 06851
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C. W. Shields, Retail Sls. Mgr.
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J. J. Pepas, Distrib. & Engr. Mgr.
B. C. Graves, Employee Rels. Mgr.
C. W. Shields, Reseller/Distrib. Mgr.

Eastern Reg.
Box 1288
Baltimore, MD 21203
W. E. Gattis, Reg. Mgr.
B. E. McLeod, Retail Sls. Mgr.
W. H. Cash, III, Retail Sls. Mgr.
D. L. Thibodeau, Mktg. Dvlpmt. Mgr.
J. S. Olsen, Distrib. & Engr. Mgr.
M. A. Robertson, Employee Rels. Mgr.

Southern Reg.
Box 367
Memphis, TN 38101
T. F. Smith, Reg. Mgr.
W. R. Carter, Retail Sls. Mgr.
M. O. Waldman, Retail Sls. Mgr.
D. H. Burkhardt, Mktg. Dvlpmt. Mgr.
W. C. Stewart, Distrib. & Engr. Mgr.
E. S. Robertson, Employee Rels. Mgr.

Western Reg.
5151 Belt Line Road
Dallas, TX 75240
K. R. Fink, Reg. Mgr.
R. R. Eaton, Mktg. Dvlpmt. Mgr.
F. W. Butler, Ret. Sls. Mgr.
R. L. Steen, Ret. Sls. Mgr.
M. E. Rollins, Distrib. & Engr. Mgr.
J. L. Randolph, Employee Rel. Mgr.
D. L. Mitchell, Distrib. Bus.

■**FCX, INC.**
P.O. Box 2419
Raleigh, NC 27602
Phone: (919) 828-4411
Key: T-R-M-Unico; G, D, F, L, LPG
Marvin McClam, Pres. & Gen. Mgr.
C. E. Smith, VP, Finances
Weldon Blanton, VP, Procurement
R. B. Stevens, Mgr., Petroleum
Jerry Senter, Asst. Mgr., Petroleum

■**FKG OIL CO.**
P.O. Box 122
Belleville, IL 62222
Phone: (618) 233-6754
Sub. of Moto, Inc.
V. Kirchoff, Pres. & CEO
C. Parrish, Exec. VP
R. Haase, VP Purch.
D. Howellman, VP Opns.
J. Forsyth, Mktg. VP

■**FS SERVICES**
(Name Changed to Growmark, Inc.)

■**FAIRLIE & WILSON CO.**
533 So. 5th St.
Elizabeth, NJ 07206
Phone: (201) 354-2100
Key: M; Dr, Fr
Sub.: Eastern Fuel Co.
John B. Wade, Jr., Pres. & CEO

■**FARMLAND INDUSTRIES**
3315 N. Oak Trafficway
Box 7305
Kansas City, MO 64116
Phone: (816) 459-6000
Key: R-M; Gw, Fw, Dw, FPGw, Lw
Sub: Farmland International Energy
Kenneth A. Nielsen, Pres. & CEO
R. H. Wakefield, VP Petroleum Opns.
J. M. Fenley, VP Refined Fuels
O. N. Shoup, VP NGL, Natural Gas
G. H. Richter, VP TBA Lubricants

■**FARM-OYL CO.**
2333 Hampden Ave.
St. Paul, MN 55114
Phone: (612) 646-7571
Key: Mfr. L; L
Robert E. Larson, Pres. & CEO
Rich Hill, Mktg. VP
Robert Anderson, Corp. Secty.
Ralph Beard, Prod. Mgr.

■**FARM STORES**
5800 N.W. 74th Ave.
Miami, FL 33166
Phone: (305) 592-3100
Key: T-M; G
A. S. Fogg, Chmn.
Tim Kitchen, Pres.
R. N. Simon, Mktg. Dir.
S. M. Fogg, VP Opns.

■**ROBERT FAWCETT & SON CO.**
Tyler Ct.
Cambridge, MA 02140
Phone: (617) 547-2360
Key: M; F
Subs: Automatic Heating Service
Monroe Oil
Gallagher Oil Co.
A. W. Nile Co.
Robt. R. Fawcett, Pres.
Robt. W. Fawcett, Treas.
Richard B. Fawcett, Exec. VP

■**FIRELINE PETROLEUM**
777 Dedham St.
Canton, MA 02021
Phone: (617) 828-4900
Key: M; G, Fw, D
Sub: Cumberland Farms
D. B. Haseotes, CEO
Jack Ryan, Dir. Supply Dist.
Neil Lawrence, Sup. Dist. Mgr.
R. M. Quinlan, Mktg. VP

■**FILL-UP, INC.**
205 Columbia St., NE
Salem, OR 97303
Phone: (503) 588-0455
Key: M; G, F, D, L
Michael M. Truax, Pres.

■**FISCA OIL CO.**
P.O. Box 3363
Kansas City, KS 66103
Phone: (913) 236-7000
Key: M; Gr, Dr
M. R. Hudson, Pres. & CEO
W. M. Van Horn, Exec. VP
Robert Crews, Jr., Mktg. VP Treas.
Arnold A. Allen, Sec.

■**FLETCHER OIL & REFINING CO.**
24721 S. Main
Carson, CA 90745
Phone: (213) 775-3503
Key: Fw, Dw, LPGw
Robert G. Fletcher, Pres.
Eugene L. McDaniels, Exec. VP
Jack Willis, Mktg. VP

■**FLETCHER OIL CO.**
471 N. Curtis Rd.
Boise, ID 83706
Phone: (208) 377-0024
Key: M; G, Fw, D, Lw
Subs: Keylock Gas Co.
Price-Less Gas, Inc.
Savway, Inc.
Peter L. Hirschburg, Pres. & CEO
Andrew A. Frick, Exec. VP
George W. Fletcher, Mktg. VP

■**FLYING J. INC.**
P.O. Box 678
Brigham City, UT 84302
Phone: (801) 734-9416
Key: I; G, D, F
Subs: Flying J. Exploration & Production
Flying J. Petroleums
Flying J. Propane
Flying J. Development
O. Jay Call, Pres.
Paul F. Brown, Exec. VP
Phil Adams, Sr. VP
Ronald Brisendine, VP Retail
R. E. Germer, VP Supply

Flying J. Petroleums
(Formerly Thunderbird Resources, Inc.)
P.O. Box 678
Brigham City, UT 84302
R. E. Germes, VP

■**FORTMEYER'S, INC.**
Junction U.S. 30 & Interstate 69
Fort Wayne, IN 46808
Phone: (219) 489-3511
Key: T, O; G, F, D, L
H. C. Fortmeyer, Pres.
Tom Schoenherr, Sec. Treas.
Larry Mayers, VP Mktg.

■**DON FOSTER OIL CO.**
P.O. Box 230
Richmond, MI 48062
Phone: (313) 727-3315
Key: T-M; G-Mobil, Sunoco, D, F, L
Richard Foster, Pres. & CEO
Harold McNinch, Mgr., Indus. Cons. Sls., Fuel Oil Sls., Farm Sls. & Trans.

Mio Div.
308 Morenci
Mio, MI 48647
Richard Bruner, Div. Mgr.

■**FOUR STAR SERVICE STATIONS**
767 44th St., SW
Grand Rapids, MI 49509
Phone: (616) 534-4913
Key: M; Gr, Fr, Dr, Lr
Ray D. Mulliken, CEO
Joanne A. Grubbs, Pres., Secty. & Treas.

Fox Inc.
P.O. Box 2419
Raleigh, NC 27602
Phone: (919) 828-4411
Key: T-R-M-Unico; G, D, F, L, LPG
Marvin McClam, Pres. & Gen. Mgr.
Brentley DeLoatche, Sr., VP
Steve Timberlake, Credit Mgr.

■**FRANKO OIL CO.**
P.O. Drawer 2440
Eugene, OR 97402
Phone: (503) 687-9200
Key: T-M; G, Dr
Affiliates: Mid Oil Co.
Jones Transportation Co.
Frank J. Boresek, Pres. & CEO
Ron McPherson, VP Mktg.
Terry Hillier, Controller
Bob Hought, Ass't Mktg. VP

■**FRONTIER PETROLEUM CO.**
214 Harvard Ave.
Boston, MA 02134
Phone: (617) 734-2070
Key: M; Gw, Dw, Fw
Sub. of Global Petro
Arthur D. Katzenberg, Jr., Pres.

■**GARD CORP.**
2727 Roe Lane
Kansas City, KS 66113
Phone: (913) 236-5000
Key: M; F, L
Louis Cohn, Chmn.
Leslie D. Cohn, Pres. & CEO
Jack W. Cohn, VP

■**GARY ENERGY CORP.**
4 Inverness Court East
Englewood, CO 80012
Phone: (303) 770-4710
Key: R-M; Gw, Dw, LPGw
Sub. of Gary Williams Oil Producer
Ron Williams, Pres.
Joe Warr, VP Supply, Distrib.; Mktg.

■**GAS CITY LTD.**
160 L. LaGrange Rd.
Frankfort, IL 60423
Phone: (312) 242-6070

■**GAS-N-GO**
P.O. Box #2
4141 Lake Ave.
Ashtabula, OH 44004
Phone: (216) 964-6183
Key: M; Gr, Dr
Raymond H. Keyes, Pres. & CEO

■**GASCO GASOLINE**
(See Desert Petroleum, Inc.)

■**GASTOWN, Div. of Emro Marketing Co.**
23660 Miles Avenue
Bedford Heights, OH 44128
Phone: (216) 335-9955
Sub. of Marathon Petroleum Co.
Key: M; Gr, Fr, Dr, Lr
Gary E. Buroker, Pres.
Ike R. Mefford, VP Mktg.
William E. Ott, VP Controller
Stephen G. Baker, Opns. Mgr.
John L. Gee, Sls. Mgr.
William J. O'Neill, Constr. & Devel. Mgr.

■**GATE PETROLEUM CO.**
P.O. Box 23627
Jacksonville, FL 32217
Phone: (904) 737-7220
Herb H. Peyton, Jr., Pres.
Wayne Levilt, Pres. Gate Mktg.

■**GELDBACH PETROLEUM CO.**
Box 157
Valley Park, MO 63088
Phone: (314) 225-3601
Key: T-M
Mary Devereauz, Pres.
Bob Ewen, VP/Gen. Mgr.
Gary Stewart, Mktg.
Kathy Folz, Gasoline Sls.

■**GEM PETROLEUM**
8710 E. Broadway
Tampa, FL 33619
Phone: (813) 626-2151
Key: T, M; Gr, Dr
Sub. of Shop & Go
Jim Robinson, Gen. Mgr.

■**GENERAL OIL CO.**
F.O. Box 2336
Batesville, AR 72501
Phone: (501) 793-9871
Key: T-M; G, D, F
Subs: Atlas Asphalt, Inc.
General Transport Co.
Charles Oil Co.
White River Materials, Inc.
H. Paul Willmuth, Chmn.
Paul Willmuth, Pres. & CEO
Charles Willmuth, VP Constr.
Andy Moore, Exec. VP
David Boone, Retail VP
R. E. Warner, Whlsl. VP

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale, retail
F	Fuel Oil, wholesale, retail
D	Diesel, wholesale, retail
LPG	Liquefied petroleum gas wholesale, retail
L	Lubricants, wholesale, retail
w	wholesale only
r	retail only

■GETTY OIL CO.
3810 Wilshire Blvd.
P.O. Box 54050
Los Angeles, CA 90054
Phone: (213) 739-2100
Key: I; G, D, F, LPG, L
Sub: Getty Refining & Marketing Co.
S. R. Petersen, Chmn. & CEO
R. N. Miller, Pres.

Getty Refining & Marketing Co.
P.O. Box 1650
1437 South Boulder
Tulsa, OK 74102
Phone: (918) 560-6000
Key: R-M; G-Getty, Skelly, Surfco, Mohawk, D, F-Getty, Skelly, Surfco, Mohawk, LPG, L
Sub. of Getty Oil Co.
Jack D. Jones, Pres.

Marketing Dept.
Thomas A. Differ, Senior VP
D. E. Spears, Mgr., Mkt. Planning & Research
L. J. Boyle, Adv. Mgr.

Petroleum Marketing
C. R. Lawson, Protects Mgr.
M. F. Convey, Adm. Mgr.

Eastern Reg.
Cherry Hill Executive Campus No. 6
Route 70 & Cuthbert Blvd.
P.O. Box 5038
Cherry Hill, NJ 08034
Phone: (609) 662-6900
Wendell D. Plummer, Reg. Mgr.
D. J. McAleenan, Real Estate Mgr.
A. A. Smith, Wholesale Sales Mgr.
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Portland, ME 04104
P.O. Box 1590
J. E. McElroy, Area Mgr.

Albany, Area
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Rensselaer, NY 12144
J. T. Lank, Area Mgr.

Central Region
1437 So. Boulder
P.O. Box 1650
Tulsa, OK 74102
Phone: (918) 560-6000
Terry J. Mason, Reg. Mgr.
Wm. A. Hopkins, Field Supv.-Dir. Ret. Div.
R. L. Butcher, Real Estate Mgr.
J. J. Linehan, Ret. Merchandising & Sales Training Mgr.
H. H. Buenemann, Technical Services Mgr.
F. H. Schoeb, Truck Stop & Whlse. Sls. Mgr.
Jack Petty, Wholesale Sales Coord.
K. R. Heaberlin, Adm. Supvr.

Kansas City Dist.
P.O. Box 2936
Shawnee Mission, KS 66201
R. A. Carlson, Dist. Mgr.

Minneapolis, MN 55420
7851 Metro Parkway
D. W. Evans, Dist. Mgr.

Des Moines, IA 50322
6000 Douglas Ave.
P.O. Box 3677
R. L. Cumings, Dist. Mgr.

Tulsa, OK 74102
912 W. Skelly Dr.
P.O. Box 1650
L. J. Gregus, Dist. Mgr.

Denver, CO 80201
3460 Fox Street
P.O. Box 269
R. R. Irvine, Dist. Mgr.

Mohawk Region
5300 Lennox Ave.-Suite 110
P.O. Box 1476
Bakersfield, CA 93302
Phone: (805) 326-4200
James W. Lear, Reg. Mgr.
B. T. Clough, Fuel Oil Sales Mgr.
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H. E. Poland, Marketing Svcs. Dir.
C. L. Coleman, Technical Svcs. Dir.
L. D. Morrill, Skelgro Sales Dir.
A. A. Taranto, Chief Engineer

Eastern Region
3600 Woodview Trace, Suite 100
Indianapolis, IN 46268
B. B. Lewis, Reg. Mgr.

Southern Reg.
1437 S. Boulder
P.O. Box 1650
Tulsa, OK 74102
R. E. Anthony, Reg. Mgr.

■GIANT INDUSTRIES, INC.
7227 North 16th Street, Building A
Phoenix, AZ 85020
Phone: (602) 274-3584
Key: R-M; G, Fw, D
Divs: Giant Refining Company
Giant Service Stations
Giant Off Road Centers
James E. Acridge, Pres. and CEO
Alvis J. Moore, Exec. VP
Robert L. Harvey, VP
Stephen J. Antoi, Treas.
Craig G. Colley, VP
Ronald S. Williams, VP, Retail Opns.

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Guy Yates, VP Mktg.
Vince Ontiveros, Mgr. Prod. Sup.
Renee Papin, Marketing Rep.
Jim Saxton, Marketing Mgr.

Giant Refinery—Ciniza
Route 3, Box 7
Gallup, NM 87301
Phone: (505) 722-3833
Carl Shook, Opns. Mgr.

Giant Transportation
Route 3, Box 7
Gallup, NM 87301
Phone: (505) 722-3833
Jerry Puckett, Mgr.

Giant Service Stations
7227 North 16th Street, Building A
Phoenix, AZ 85020
Phone: (602) 274-3584
Terry Crees, Gen. Mgr.
George Armento, Mgr., Goodies Convenience Stores

Giant Off Road Centers
7227 North 16th Street, Building A
Phoenix, AZ 85020
Phone: (602) 274-3584
Marvin Worrell, Gen. Mgr.

■GIBBS OIL CO. (see Astroline Corp.)

■GIFFORDS ENERGY CO.
58 S. Tyson Ave.
Floral Park, NY 11001
Phone: (516) 354-5555
Key: M; Dr, F, Fr
Sub: Dyna Cool Energy Co.
Fred Giffords, Chmn.
Al Taule, Pres.
Ernie Edricks, VP Mktg.
Gus Horvath, VP Fin.
Jerry Dorfman, Sls. Mgr.
Jerry McPhail, Svc. Mgr.
Bob McCanlis, Installation Mgr.
Bob Clark, Purch. Agent
George Russ, Opns. Mgr.

■GODWIN OIL CO.
P.O. Box 1888
129 Castle Hayne Rd.
Wilmington, NC 28402
Phone: (919) 762-0312
Key: T-M-Texaco; G, F, L, D
E. P. Godwin, III, Pres.
Charles Godwin, VP, Opns. Mgr.
Tom Pearsall, VP, Whlsl. & Indus. Sls.
William C. Godwin, II, Secty-Treas. Mgr., Real Estate
Earl Ward, Off. Mgr.
Irvin Strickland, Credit Mgr.

■GOLDEN EAGLE REFINING CO.
707 Wilshire Blvd., Suite 5200
Los Angeles, CA 90017
Phone: (213) 624-7841
Key: R-M; Gw, Dw, Fw
Sub. of Ultramar Co., Ltd.
Joel Mascitelli, VP, Supply & Distrib.
Murray Covert, Gen. Mgr., Gasoline Sls. & Supply
Mike Ayres, Mgr. Ref. Sup.
Burl Freeman, VP Ref.
Lloyd Tracy, Ref., Supt.

■GOLDEN GATE PETROLEUM CO.
220 Powell Street, Suite 750
Emeryville, CA 94608
Phone: (415) 428-2600
Key: Prod.-T-M; Gw, Dw, Fw, Lw
Subs: Bay Area Petroleum Co.
Golden Gate Marine Sales
Holdener Petroleum Co.
Dennis O'Keefe, Pres. & CEO
Richard C. Dawson, Exec. & Mktg. VP
Chris Price, Gen. Sls. Mgr.

■GOLDEN IMPERIAL
See Rock Island Ref. Corp.

■GOLUB CORP.
501 Duanesburg Rd.
Schenectady, NY 12306
Phone: (518) 355-5000
Key: M; Gr-Chevron, Dr
Lewis Golub, CEO
Neil M. Golub, Pres.
Dave Bronstein, Exec. VP
Simon P. Brennan, VP, Svc. Stas.

■GO-TANE SERVICE STATIONS
949 S. Harlem Ave.
Forest Park, IL 60130
Phone: (312) 366-3663
E. V. Silveri

■GRAMCO, LTD.
P.O. Box 108
Finnimore, WI 53809 & 0108
Phone: (608) 822-3201
Key: M; Gw, Dw, Fw, L
Paul S. Graham, Pres.
Larry W. Newman, Gen. Mgr. Sls.

■GREAT RIVER OIL CO.
20 Ladue Meadows
St. Louis, MO 63141
Phone: (314) 567-4852
Key: M; G, L
Sub: Oklahoma Petroleum Co.
Robert L. Burg, Pres.
R. E. Clark, VP, Mktg.
Irving Dunbinsky, Secty.-Treas.

■GRESHAM PETROLEUM CO.
P.O. Box 270
Indianola, MS 38751
Phone: (601) 887-2160
Key: M-Amoco; G, D, F, LPG, L
W. W. Gresham, Jr., Pres. & CEO
W. W. Gresham, III, Mktg. VP & Sec. Treas.
John W. McPherson, Exec. VP
Tom Gresham, Sls. Mgr. & Adv. Mgr.

■JACK GRIFFITH PETROLEUM PRODUCTS, INC.
P.O. Box 1747
Stillwater, OK 74076
Phone: (405) 372-7665
Key: M; G, D, Lr
Subs: Gasoline Marketing, Inc.
Alpine Trucking, Inc.
Griffith Petroleum Mgmnt. Corp.
Jack A. Griffith, Pres. & CEO
Jim Griffith, Exec. VP COO
David Johnson, Gen. Sls. Mgr.
Stephan T. James, Comptroller

■GROWMARK, INC.
(Formerly FS Services)
P.O. Box 2500
Bloomington, IL 61701
Phone: (309) 557-2419
Key: M; Gw, Dw, Fw, LPGw, Lw
Kenneth P. Baer, CEO
D. Glenn Webb, Pres.
Kenneth P. Baer, Exec. VP
Marvin L. Weisert, VP Mktg.
John Kelly, Mgr., Petro. Div.
Sam Schriner, Adv. Mgr.

■GULF CANADA, LTD.
130 Adelaide St., West
Toronto, Ont. M5H 3R6
Phone: (416) 869-8600
Key: I, G, D, F, LPG, L
Sub. of Gulf Oil Corp. (60.2%)
Subs: Servico Ltd.
Superior Propane Ltd.
Commercial Alcohols Ltd.
J. C. Phillips, Q. C., Chmn.
J. L. Stoik, Pres. & CEO
Dr. M. Bregazzi, VP Planning & Devel.
A. R. Sello, Controller
J. R. Tysall, Treas.
E. E. Walker, VP Admin.
W. M. Winterton, VP, Gen. Counsel.
R. T. Brown, Pres., Gulf Canada Products Co.
J. D. DeGrandis, Pres., Chmn. & CEO, Superior Propane Ltd.

Gulf Canada Products Co.
800 Bay St.
Toronto, Ont. M5S 1Y8
Phone: (416) 927-2500
R. T. Brown, Pres.
J. D. DeGrandis, Pres., Chmn. & CEO, Superior Propane Ltd.
M. P. Peterson, VP Mktg.
R. W. Hodgson, Dir. Whsle. Mktg.
D. A. Kennett, Dir. Distrib./Mktg.
R. S. Codere, Dir. Automation/Mktg.
V. R. Knox, Dir. Ad. Mktg.
R. E. Scott, Dir. Motorist Mktg.
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R. E. Leveque, Dir. Chemicals & Ref. Sls. Mktg.

Eastern Mktg. Reg.
477 Mt. Pleasant Rd.
Toronto, Ont. M4S 2M1
Phone: (416) 486-2121
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2020 University St.
Montreal, Que. H3A 2L4
Phone: (514) 284-5111
M. Gautier, Mgr. Whsle. Quebec & Atlantic
M. Bergeron, Mgr. Motorist Quebec & Atlantic

Western Mktg. Reg.
1122-4th St., SW
P.O. Box 4444
Calgary, Alta. T2P 2R1
Phone: (403) 233-4000
J. Pantelidis, Reg. Mgr.-Western Canada
L. G. Clay, Mgr., Whsle. Prairie
S. E. Parker, Mgr., Whsle. Pacific
K. G. W. Turner, Mgr. Motorist
A. D. Knights, Mgr., Distrib.
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D. H. Bell, Mgr. Opns./Plnng.

■GULF OIL CORP.
439 Seventh Ave.
P.O. Box 1166
Pittsburgh, PA 15219
Phone: (412) 263-5000
Key: I; G, D, F, LPG, L
James E. Lee, Chmn. & CEO
Edward B. Walker, 3rd. Pres.
M. J. K. II, Exec. VP

Gulf Refining and Marketing Co.
P.O. Box 2001
Houston, TX 77252
Phone: (713) 754-2000
C. H. Bowman, Pres.
C. L. Campbell, Sr. VP-Crude & Trans.
J. E. Smith, Sr. VP Manf.
R. E. Hall, Sr. VP Mktg.
A. R. Larocque, VP, Fuels & Lubes
L. R. Crockett, Gen. Mgr., Strategy & Programs
C. A. Mattei, Gen. Mgr., Natl. Accts.
C. H. Nelson, Gen. Mgr., Supp. & Distrib.
A. W. O'Donnell, VP-Retail Sales
C. R. Wortham, Jr., Gen. Mgr., Retail Coord.
L. G. Walker, VP, Unbranded Sales
M. A. Lawrence, Gen. Mgr., Mktg. Opns.

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Atlanta, GA 30357-0117
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F. T. Odom, Gen. Mgr.

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P.O. Box 222808
Dallas, TX 75222
(214) 699-6600
W. L. Taylor, Gen. Mgr.

Houston District
P.O. Box 55352
Houston, TX 77055
(713) 827-4800
L. H. Brittain, Jr., Gen. Mgr.

Mid-Atlantic District
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Baltimore, MD 21203
(301) 337-5300
R. F. Bradley, Gen. Mgr.

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Nashville, TN 37215
(615) 385-0280
R. E. Barger, Gen. Mgr.

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East Providence, RI 02914
(401) 438-9100
R. P. Greisler, Gen. Mgr.

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W. G. Crouch, Gen. Mgr.

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Hackensack, NJ 07601
(201) 488-4700
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Maitland, FL 32751
(305) 629-1898
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300 Penn Center Boulevard, Suite 800
Pittsburgh, PA 15235
(412) 824-9900
W. J. Berghoff, Gen. Mgr.

Richmond District
P.O. Box 11287
Richmond, VA 23230-1287
(804) 254-0200
W. D. Steelman, Gen. Mgr.

■GULF STATES OIL & REFINING CO.
P.O. Box 53137
Houston, TX 77052
Phone: (713) 751-2000
Key: I; Gw, Dw, Fw, LPGw
Thomas C. Thompson, Pres. & CEO
John Scott Thompson, VP—Refined Prod.
Tim Mercier, VP

■GULL INDUSTRIES
3404 4th Ave. So.
Seattle, WA 98105
Phone: (206) 624-5900
Key: T-M; G, D, F
Cecil True, Jr., Pres. & CEO
Douglas L. True, Exec. VP
William True, Exec. VP
Jack Kreider, VP, Whlsl.
Jeff Scott, VP Retail

■GUTTMAN OIL CO.
200 Speer Rd.
Belle Vernon, PA 15012
Phone: (412) 483-3533
Key: M; G, F, D, L
Howard S. Guttman, Chmn.
Alan R. Guttman, Pres.
Maury S. Guttman, Exec. VP
Ralph Antone, VP Sls.
Harvey Davis, VP, Real Estate
Gene Solomon, Branch Mgr.
Richard M. Guttman, VP
Alan H. Sinning, Credit Mgr.
John Weeter, Terminal & Opns. Mgr.

■HALSTED-QUINN FUEL CO.
Div. of Anthony Tarricone, Inc.
33 Hubbells Dr.
Mt. Kisco, NY 10549
Phone: (914) 666-5107
Bill Nolan, Gen. Mgr.
Nancy Herlihy, Offc. Mgr.
John Egan, LPG Mgr.

■HAMILTON OIL Co.
708 Dermon Bldg.
Memphis, TN 38103
Phone: (901) 526-2161
Key: M; Gw, Fw
B. B. Hamilton, Sr., Pres. & CEO
Paula G. Dryden, Corp. Sec., Office Credit Mgr.

Eastern Div.
708 Dermon Bldg.
Memphis, TN 38103

Western Div.
P.O. Box 50029
Denton, TX 76206
Phone: (817) 565-0849
W. C. Pinson, Mgr., Western Opns

■HANNEY FUEL OIL CO., INC.
276 N. Henry St.
Brooklyn, NY 11222
Phone: (212) 383-4200
Key: T-M; D, Fr
Thos. F. Hanney, Pres. & CEO
Raymond T. Hanney, Exec. VP

■HARRIS ENTERPRISES
1717 S. Madison
Portland, OR 97205
Phone: (503) 222-4201
Key: M; G-Arco, D, F
G. R. Harris, Pres.
Richard T. Harris, VP
David L. Harris, Gen. Sls Mgr.
L. E. Hollenbeck, Mgr., Jobber Sls.
Harold Nelson, Jr., Controller

■HARRELL PETROLEUM CO.
P.O. Box 7699
Corpus Christi, TX 78469
Phone: (512) 882-8838
Key: T-M; G, D, L
T. A. Harrell, Jr., CEO
Margaret Waller, Exec. VP
Alex Harris, Pres.
Lee D. Martin, VP Mktg. & Gen. Sls. Mgr.

■HARTFORD-WOOD RIVER TERMINAL, INC.
(Formerly Keller Piasa Terminal, Inc.)
P.O. Box 25
Hartford, IL 62048
Phone: (618) 254-2855
Key: M; Gw, Dw, Fw
Robert W. Schrimpf, Pres. & CEO
Rex Mowry, Exec. VP

■HAUCK OIL CO.
125 W. Maples St.
New Lenox, IL 60451
Phone: (815) 485-2112
Key: M; Fw, Gw
Everett J. Hauck, Pres. & CEO

■HEATHWOOD OIL CO.
2011 N. Tenth St.
Kansas City, KS 66104
Phone: (913) 321-1764
Key: T-M-Kerr-McGee, Gw, Fw, Lw
Sub: City Oil Co., Inc.
James W. Shondell, Pres.
Steven Shondell, VP

■HERBST OIL CO.
(Formerly Terrible Herbst, Inc.)
5195 Las Vegas Blvd. So.
Las Vegas, NE 89119
Phone: (702) 798-6400
Key: T, M; G, D, L
Subs: Herbst Supply, Herbst Enterprises
Jerry Herbst, Pres. & CEO
John Kerley, Exec. VP

■HIGHLAND PETROLEUM INC.
1075 So. Yukon St.
P.O. Box 80226-0215
Lakewood, CO 80226
(303) 987-0820
Doug Baker, Pres.
Carl Baker, Exec. VP
Steve Baker, Sec. Treas.

Southern Div.
4677 So. 83rd E. Ave.
Tulsa, OK 74145
Carl Baker, VP

Kentucky & Ohio Dist.
611 Buttermilk Pike
Crescent Springs, KY 41011
Phone: (606) 331-7250
Jack Borman, Agent

■HIGHWAY OIL
12th Floor First National Tower
Topeka, KS 66603
Phone: (913) 357-6161
Key: M; C, D, L
Sub: Hi-Lo Oil Co.
A. B. Hudson & J. M. Hudson, CEOs
Tom G. Platis, Pres.
Eugene H. Meyer, Exec. VP
Paul D. McFann, VP & Sec. Treas.
Sandra J. Crouch, VP
Richard B. Toner, VP
R. J. Gaffney, VP
John Peel, VP Mktg.

■HILL PETROLEUM CO.
1001 Fannin, Suite 1500
Houston, TX 77002
Phone: (713) 759-6400
Key: T-M; Gw, Dw
David G. Davidson, Pres.
James M. Bryant, Exec. VP
Paul D. Nelson, VP Fin. Admin.
C. E. Duyess, VP Mktg.
Charles LeMaster, Treas.

■ANGUS I. HINES
1426 Holland Rd.
Box 1080
Suffolk, VA 23434
Phone: (804) 539-2358
Key: T, M; G, F, D, LPGr, L
Subs: Greenville Transport Co.
Sentry Petroleum, Inc.
Central Oil Corp.
Service Gas Co., Inc.
Angus I. Hines, Jr., Pres.
Robt. L. Story, VP
Larry L. Felton, Sec. Treas.
Douglas I. Phelps, Mgr., Svs. & Fuel Oil Sls.
Lucy E. Parker, Credit Mgr.
T. Oscar Lamb, Opns. Mgr.

Franklin Oil Co.
P.O. Box 57
Franklin, VA 23851
James O. Lindsey, Mgr.

Central Oil Corp.
P.O. Box 587
Rocky Mount, VA 24151
Richard P. Stone, Mgr.

Central Oil Corp.
Gretna, VA 24457
Mrs. J. W. Johnson, Mgr.

Sentry Petroleum
5539 Faris St.
Norfolk, VA 23513
T. L. Hampton, Mgr.
Donald Pollard, Plant Mgr.

Service Gas Co.
P.O. Box 13
Wytheville, VA 24382
Johnson Crawford Jr., Pres.

Greensville Transport Co.
Box 1080
Suffolk, VA 23434
Thomas V. Arthur, Mgr.

■HINKLE DISTRIBUTORS
P.O. Box 6366
Midland, TX 79711
Phone: (915) 563-2092
Key: M; G-Chevron, D, L
Harry Hinkle, Pres. & CEO
Ted R. Bevers, Gen. Mgr.

■BARNEY HOLLAND OIL CO.
2809 N. Main St.
Ft. Worth, TX 76106
Phone: (817) 626-1962
Key: M; G-Texaco, D, F, L
J. Walker, Holland, Pres.
Lindsay B. Holland; VP
Barney B. Holland Jr., VP
Priscilla B. Holland, Sec.-Treas.
Luke J. Spavero, Controller
M. E. Downey, Gen. Sls. Mgr.

■HOLLAND OIL CO.
686 E. North St.
Akron, OH 44305
Phone: (216) 434-4080
Key: M; G, D, F, L
Charles H. Holland, Pres. & CEO
Carl Hummel, Exec. VP
John Ballard, Mktg. VP

■HOP-IN-FOOD STORES
P.O. Box 260
348 Campbell Ave.
Roanoke, VA 24002
Phone: (703) 982-8460
Key: M; G, D, F
Sub. of Silverwood Industries, Ltd.
John M. Hudgins, Pres.
John Moticha, Exec. VP Finance

■HORKEY OIL CO.
P.O. Box 2669
Lubbock, TX 79408
Phone: (806) 765-6681
Key: M; G-Shell, D, LPG, L
Joe R. Horkey, Pres. & CEO
Eugene Faulkner, VP Mktg.
L. Johnson, Credit Mgr.
Beth Gore, Comptroller

Horkey LP-Gas Co.
dba Plains Gas Co.
P.O. Box 5067
Lubbock, TX 794117
Jane Carter, Mgr.

P.O. Box 447
Brownfield, TX
Odus Walser, Mgr.

Tank Lines, Inc.
(Same address as Horkey LP-Gas Co.)

Petrotex Marketing
P.O. Box 10274
Midland, TX 79702
Rip Horkey, Pres. & CEO
Joe R. Horkay, VP

KEY

I	integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale, retail
F	Fuel Oil, wholesale, retail
D	Diesel, wholesale, retail
LPG	Liquefied petroleum gas wholesale, retail
L	Lubricants, wholesale, retail
w	wholesale only
r	retail only

■HORN DISTRIBUTING CO., INC.
P.O. Box 5013
Santa Fe, NM 87501
Phone: (505) 471-0512
Key: M; G, D, L
H. N. Wisanteiner, Pres. & CEO
J. W. Sellers, VP, Mktg.

■HORNET OIL CO.
P.O. Box 35347
Tulsa, OK 74153
Phone: (918) 622-4166
Key: M; Gr
John Whitaker, Pres.
Bob Watson, VP
June Whitaker, VP

■HOTCHKISS INDUSTRIES
P.O. Box 544
Fredericksburg, VA 22401
Phone: (703) 373-8000
Key: Prod.-M; Fw
Charles S. Hotchkiss, Sr., Pres. & CEO
Charles S. Hotchkiss, Jr., Exec. VP
Pauline S. Hotchkiss, Sec. Treas.

■E. F. HOUGHTON & CO.
Madison & Van Buren Aves.
Valley Forge, PA 19482
Phone: (215) 666-4000
Key: Prod.-M; Indus. Oils & Chems.
Sub: E. F. Houghton, Canada Inc.
W. F. MacDonald, Jr., Pres. & CEO
A. P. Jarman, VP Sls.
F. H. Whitten, Adv. Mgr.

■HUB-LANGIE FUEL CORP.
P.O. Box 22
Rochester, NY 14601
Phone: (716) 235-0940
Key: M; G, F, D, L
Subs: Arnold Oil Corp., Dewey Jackson Co.
William F. Huberlie, Pres. & Treas.
Adolf B. Zuch, Sec.-Controller
Kenneth A. Burchill, Opns. Mgr.

■HUDSON OIL CO. & AFFILIATED COS.
P.O. Box 907
Kansas City, MO 64141
Phone: (913) 362-4000
Key: R-M; G, D, F
Mary Hudson, Chmn.
Tom M. Raimo, Pres.
Joyce Hudson Cady, VP Treas.

■HUGHES OIL CO.
Box 1566
Daytona Beach, FL 32015
Phone: (904) 255-1111
Key: M; G-Mobil, Phillips, D, F, L
Subs: Hughes Fuel Oil Co.
  Mattick Oil Co.
  Self Service Oil Co.
Reid B. Hughes, Pres. & CEO
Joseph Gentempo, Exec. VP

■L. M. HUGHEY CO.
205 S. Hoover St.
Tampa, FL 33609
Phone: (813) 870-2323
Mike Hughey

■HULL OIL CO.
P.O. Box 2266
Panama City, FL 32402
Phone: (904) 763-1746
Key: M; G-Hull, D, F-Hull, L
Deck Hull, Pres.
Anne H. Boulnois, Exec. VP

■HUSKY OIL MARKETING LTD.
707 8th Avenue S.W.
Calgary, Alberta, Canada T2P 3G7
Phone: (403) 298-6111
Key: I; G, F, L, D, LPG
Sub. of Husky Oil Operations, Ltd.
S. Robert Blair, Chmn.
A. R. Price, Pres.
H. A. Warnock, VP Supply & Distrib. Mktg.
D. R. Ingram, Gen. Mgr. Mktg.

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811 Rusk-Suite 733
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Robt. S. Bramlett, Chmn. & CEO
Gerald J. LaBouff, Pres.
Stanley H. Gwinn, VP
Kathy Kremer, VP, Supply & Distrib

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Toronto, Ont., M5W 1K3 Canada
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  Atlas Supply Co. of Canada Ltd
  Building Products of Canada Ltd
  Byron Creek Collieries Ltd
  Canada Wide Mines Ltd
  Champlain Oil Products Ltd
  Delta Rope & Twine Ltd
  Devon Estates Ltd
  E S F Ltd
  Esso of Canada Ltd
  Esso Resources Canada Ltd
  The Imperial Pipe Line Co. Ltd
  Lee Restaurants Le Voyageur
  Maple Leaf Petroleum Limited
  Mongeau & Robert Cie Ltée
  95269 Canada Limited
  Nisku Products Pipe Line Co. Ltd
  Northwest Company, Ltd
  Renown Building Materials Ltd
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  Winnipeg Pipe Line Company Ltd
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T. H. Thomson, Sr. VP
W. J. Young, Sr. VP
G. H. Thomson, Pres., Esso Petroleum Canada
M. G. Handford, Exec. VP, Esso Petroleum Canada

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Phone: (317) 631-8361
Key: I; Gw, Fw, LPGw, Lw
Charles E. Kerber, Pres.
John H. Stearn, Secty.
Philip F. French, Exec. VP
Ronald Stover, Mgr. Pet. Mktg.

Pipeline & Terminals Div.
P.O. Box 277
Westfield, IN 46074
Phone: (317) 896-2566
Don Korff, Mgr., Trans.

Wholesale Sales Div.
1200 Refinery Rd.
Mt. Vernon, IN 47620
Phone: (812) 838-4341
Val Ward, Purchasing Agent

■INTER-CITY OIL CO. OF ST. CLOUD
See Stormy Oil Co.

■IRVING OIL, LTD.
P.O. Box 1421
Saint John, New Brunswick,
E2L 4K1 Canada
Phone: (506) 657-7722
Key: R-M; G, F, LPG, L
A. L. Irving, Pres.
J. E. Irving, VP Dir.
J. K. Irving, VP

■J. & L. OIL, INC.
204 Rte. 45
Vernon Hills, IL 60061
Phone: (312) 362-0560
Key: M; G, D, F, L
Sub: Buy Wright Service Inc.
L. L. Wright, Pres.
G. L. Wright, Exec. VP
Robt. G. Elmore, VP, Mktg.
James G. Bishop, Gen. Sls. Mgr.

■J S & J SERVICE INC.
1013 West Holt Blvd.
Ontario, CA 91761
Phone: (714) 986-5831
Key: M; Gr, Dr
Sub: Terminal Stations
Philip Kelber, CEO
Sam Kelber, Pres.
Larry Emchick, VP & Treas.
June Valdez, Opns. Mgr.
Steven Kelber, Sec.

■JACOBUS CO.
2323 N. Mayfair Rd.
Milwaukee, WI 53226
Phone: (414) 476-0701
Key: M; G-Cities Service Union, D, F-Quickflash
C. D. Jacobus, Pres. & CEO
K. J. Kuemmel, Sr. VP
J. Suehlek, VP, Retail
H. Powers, VP, Whlsl.

■JENNEY OIL CO.
250 Boylston St.
Chestnut Hill, MA 02167
Phone: (617) 332-4740
Key: O
Subs: Boylston Lessors, Inc.
Robert M. Jenney, Pres. & CEO
C. W. Hill, Treas.
William Salem, Clerk

■JESCO RESOURCES, INC.
1437 Gentry St.
P.O. Box 12337
North Kansas City, MO 64116
Phone: (816) 471-4590
Key: M; Lw
Subs: Jesco of Georgia
Jesco of California
E. R. Howell, Pres. & CEO
Jack Peacock, Gen. Sls. Mgr.
Jim Gilmore, Mgr., Jesco of California
Dale Jones, Mgr., Jesco of Georgia

■JOHNSON PRODUCTS
P.O. Box 1108
Lawrence, MA 01842
Phone: (617) 685-7200
Key: M; G, F, D
D. J. Moore, Pres. & Treas.
E. F. Xavier, VP Opns.

■JONES OIL CO.
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Kennett, MO 63857
Phone: (314) 888-6705
Key: M; G, Dw, Lw
Wm. S. Jones, Pres.
Sid Jones, Exec. VP

■KAIBAB PETROLEUM CO.
Box 20506
Phoenix, AZ 85036
Phone: (602) 840-5555
Key: M; G, D, L
William Cassel, Pres.
A. V. Steen, VP
W. D. Woodroffe, VP
D. Church, Mgr. Whlsl. Lub.
J. Mosur, Mgr. Whlsl. Lub.

■KELLAM DISTRIBUTING CO.
Accomack County
Belle Haven, VA 23306
Phone: (804) 442-5811
Key: T-M-Texaco; G, F, LPG, L, D
Lucius J. Kellam, Chmn.
Lucius J. Kellam, III, Pres.
H. Allen Floyd, Exec. VP Mktg.
E. Polk Kellam, Jr., Sec., Treas.
Stephen A. Storey, VP Fin.
Robert L. Miller, Gen. Mgr. LPG

■KELLER-PIASA TERMINAL
(Name changed to Hartford-Wood River Terminal, Inc.)

■KELLETT OIL CO.
P.O. Box 889
Sikeston, MO 63801
Phone: (314) 471-4168
Key: M; G, D
Don E. Kellett, Pres. & CEO
Sandra Ottinger, Exec. VP

■KELLEY-WILLIAMSON CO.
1132 Harrison Ave.
Rockford, IL 61101
Phone: (815) 397-9410
Key: M; G-Mobil, D, F-Mobil, L
Sub: G. W. Corp., Beloit, WI
Dorian Fisher, Pres.
Geo. E. Rolinger, Gen. Sls. Mgr.
John Griffin, C-store Mgr.

■KENAN OIL CO.
Hillsboro Rd.
Durham, NC
Phone: (919) 383-2541
Key: M; G, F, LPG, L, D
Sub. of Kenan Properties, Inc.
Sub: Keland Co., Inc.
Frank H. Kenan, Chmn. & CEO
Owen G. Kenan, Pres.
J. H. Mallard, Asst. VP

■KENT OIL CO.
P.O. Box 3902
Midland, TX 79702
Phone: (915) 563-1620
Key: M; G-Shell; D
Sub: Kent Lubrication Centers
E. L. Kent, Pres. & CEO
W. B. Kent, Exec. VP
R. C. Snoddy, VP & Gen. Mgr.

■KERR-MCGEE REFINING CORP.
P.O. Box 25861
Oklahoma City, OK 73125
Phone: (405) 270-1313
Subs: Cato Oil and Grease Co., Inc.
Southwestern Refining Co., Inc.
Triangle Refineries, Inc.
McClaran Jordan, Pres.
A. R. Gockel, Exec. VP
Morgan Moore, VP Ref.
J. N. Fruits, VP Admin.
G. E. Tiernan, Controller
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A. W. Babcock, Mgr. TBA and Lube Oil Sls.
H. B. Hopps, Mgr. Asphalt Sales
M. L. Allgeier, Mgr. Fuel Sales
H. E. Burba, Dir. Mktg. Admin.
G. W. Williams, Mgr. Station Opns.
R. A. Owen, Mgr. Prod. Sup. & Distrib.
K. L. Burger, Mgr. Credit Petro. Mktg.
J. R. Jaynes, Mgr. Wholesale Credit
A. H. McKinnon, Mgr. Retail Credit

Northern Resale Area
105 S. E. 45th Street
Oklahoma City, OK 73129
Phone: (405) 270-2031
R. L. Huff, Mgr.

Southern Resale Area
105 S. E. 45th Street
Oklahoma City, OK 73129
Phone: (405) 270-2024
S. A. Kearney, Mgr.

Refining Division
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W. E. Ward, Jr., Mgr. Ref. Eng.

Wynnewood Refinery
Box 305
Wynnewood, OK 73098
Phone: (405) 665-4311
Walter Bare, Ref. Mgr.
J. T. Rucker, Mgr. Industrial Relations

Cotton Valley Refinery
P.O. Box 97
Cotton Valley, LA 71018
Phone: (318) 832-4237
C. E. Dykes, Plant Mgr.

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Box 9217
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Morgan Moore, Exec. VP
B. E. Brown, VP Gen. Mgr.
C. A. Steen, VP Admin.
D. R. Oakes, VP Tech.
T. S. Hoover, Mgr. Opns.
Tom Sands, Mgr. Maintenance

Dubach Gas Processing Plant
P.O. Box 68
Dubach, LA 71235
Phone: (318) 777-3416
Bill Thacker, Plant Mgr.

Triangle Refineries, Inc.
(A wholly owned subsidiary of Kerr-McGee Refining Corporation)
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Houston, TX 77005
P.O. Box 3367
Houston, TX 77253
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Thurman Esselmeyer, Mgr. Heavy Fuel Oil Sls.
Ron Frisk, Light Prod. Trader
J. E. Haire, Gen. Mgr. Wholesale Sls.
Marlin Larson, Mgr. National Accounts
Charles McComb, Mgr. Credit
G. W. Murray, Mgr. Supply and Trading
E. T. Sabin, Controller
F. R. Walter, Gen. Mgr. Petrochemicals
Jerry D. Willis, Mgr. Mktg. Admin.

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Specialty Products
820 Jordan Street, Suite 346
Shreveport, LA 71101
Phone: (318) 221-2614
W. W. Jones, Mgr. Spec. Prod.

Specialty Products
1701 Lake Avenue
Glenview, IL 60025
Phone: (312) 724-7372
Glen Asauskas, Assoc. Sls. Rep.

Specialty Products
P.O. Box 47427
Doraville, GA 30362
Phone: (404) 457-5268
Tony Ostendorf, Assoc. Sls. Rep.

Wholesale Division Offices
Atlanta Division
P.O. Box 47427
Doraville, GA 30362
Phone: (404) 457-5268
Tom A. Morris, Jr., Div. Mgr.

Goldsboro Office
Mid-Towne Mall, Suite 204
200 West Ash Street
Greensboro, NC 27530
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Ken Jordan, Senior Sls. Rep.

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Birmingham, AL 35202
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Rod Parrish, Sls. Rep.

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1701 Lake Avenue
Glenview, IL 60025
Phone: (312) 724-7372
William A. Miles, Div. Mgr.

Houston Division
2600 Nottingham
Houston, TX 77005
Phone: (713) 663-4905
Doug Elder, Div. Mgr.

Indianapolis Division
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Indianapolis, IN 46234
Phone: (317) 291-0430
Bill Ryser, Div. Mgr.

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Box 3171, Station F
Jacksonville, FL 32206
Phone: (904) 355-8396
W. H. Reynolds, Div. Mgr.

Louisville Division
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Louisville, KY 40216
Phone: (502) 447-1030
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Mobile Division
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Mobile, AL 36633
Phone: (205) 438-4736
Rudy Hill, Div. Mgr.

Nashville Division
P.O. Box 100433
Nashville, TN 37210
Phone: (615) 256-2477
Edgar Hypes, Div. Mgr.
Kyle Britt, Sls. Rep.

Omaha Division
4848 South 120th Street, Suite 415
Omaha, NE 68144
Phone: (402) 896-0207
William Farris, Div. Mgr.

St. Louis Division
Drawer A, Mehlville Branch
St. Louis, MO 63129
Phone: (314) 892-0300
Chet Fream, Div. Mgr.

Shreveport Division
820 Jordan Street, Suite 346
Shreveport, LA 71101
Phone: (318) 222-1176
H. N. Wells, Jr., Div. Mgr.
Ross Nattin, Sls. Rep.

Syracuse Division
4317 East Genesee St., Room 207
DeWitt, NY 13214
Phone: (315) 445-0606
Ron Criss, Senior Sls. Rep.

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale, retail
F	Fuel Oil, wholesale, retail
D	Diesel, wholesale, retail
LPG	Liquefied petroleum gas wholesale, retail
L	Lubricants, wholesale, retail
w	wholesale only
r	retail only

Tampa Division
1111 North Westshore Blvd.,
Suite 509
Tampa, FL 33607
Phone: (813) 879-6400
Curtis Hill, Div. Mgr.

West Coast Division
444 West Ocean Blvd., Suite 510
Long Beach, CA 90802
Phone: (213) 590-8553
James Caiopoulos, Mgr. West Coast Trading

Royal Petroleum, A Division of Triangle Refineries, Inc.
42-20 Vernon Blvd.
Long Island City, NY 11101
Phone: (212) 784-6400
H. F. Presley, Gen. Mgr.
John Dalton, Asst. Gen. Mgr.
R. T. Shields, Mgr. Supply & Distrib.
Jack Baird, Senior Sls. Rep.
Jack Bradley, Senior Sls. Rep.
Jack Kern, Senior Sls. Rep.

Triangle Terminals
Anniston Terminal
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Phone: (205) 831-0201

Atlanta Terminal
P.O. Box 47427
Doraville, GA 30362
Phone: (404) 457-5268

Birmingham Terminal
P.O. Box 10625
Birmingham, AL 35202
Phone: (205) 925-6290

Birmingport Terminal
Route #2
Mulgo, AL 35118
Phone: (205) 436-3211

Chicago (Bell) Terminal
3741 South Pulaski Rd., Hawthorne Station
Chicago, IL 60623
Phone: (312) 254-2211

Chippewa Falls Terminal
P.O. Box 307
Chippewa Falls, WI 54729
Phone: (715) 723-2955

Choctaw Point Terminal
P.O. Box 1546
Mobile, AL 36633
Phone: (205) 433-1631

Clermont Terminal
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Indianapolis, IN 46234
Phone: (317) 291-0430

Jacksonville Terminal
P.O. Box 3171, Station F
Jacksonville, FL 32206
Phone: (904) 355-8396

La Grange Terminal
P.O. Box 180
La Grange, MO 63448
Phone: (314) 655-4707

Louisville Terminal
P.O. Box 16188
Louisville, KY 40216
Phone: (502) 447-1030

Lynn Park Terminal
Route #2
Cordova, AL 35550
Phone: (205) 483-7828

McFarland Terminal
P.O. Box 464
McFarland, WI 53558
Phone: (608) 222-3657

Mobile Terminal
P.O. Box 1546
Mobile, AL 36633
Phone: (205) 438-4736

Nashville Terminal
P.O. Box 100433
Nashville, TN 37210
Phone: (615) 256-2477

Niceville Terminal
P.O. Box 232
Niceville, FL 32578
Phone: (904) 678-5159

St. Louis Terminal
P.O. Drawer A, Mehlville Branch
St. Louis, MO 63129
Phone: (314) 892-0300

New Hyde Park Terminal
P.O. Box R116
New Hyde Park, NY 11040
Phone: (516) 354-4545

Sewaren Terminal
P.O. Box 98
Sewaren, NJ 07077
Phone: (201) 634-3344

Long Island City Terminal
42-20 Vernon Boulevard
Long Island City, NY 11101
Phone: (212) 784-6400

■**KEY ENERGY ENTERPRISES**
9250 Bay Plaza Blvd.
Suite 320
Tampa, FL 33619
Phone: (813) 623-5666
Key: I; G, F, D, L
Subs: Key Petroleum, Inc.
Key Food Marts, Inc.
Key Stops, Inc.
B. Mack DeVine, Pres. & CEO
Jerry Lovenworth, Exec. VP
W. M. "Skip" Bordeis, Jr., VP Opns.

■**KICKAPOO OIL CO.**
215 E. Madison St.
Hillsboro, WI 54634
Phone: (608) 489-3631
Key: M; G, L
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333 Main Street
Madison, NJ 07940
Phone: (201) 377-6000
Key: M; G-Amoco, Citgo, Getty; Gw, Dw, Fw
Subs: Allen Oil Corp.
Allen-Kimber Corp.
Carlton Oil Corp.
Warren S. Kimber, Jr., Pres. & CEO
J. L. DeZerga, VP
Carl Braun Jr., VP

■KIMBRO OIL CO.
2200 Clifton Rd.
Nashville, TN 37203
Phone: (615) 320-7484
Key: M; G, D, L
Harlon J. Kimbro, Sr., Pres. & CEO
Harlon J. Kimbro, Jr., Exec. VP
Wm. C. Kimbro, Mktg. VP
D. Scott Kimbro, Treas.

■KINGSTON OIL SUPPLY CORP.
P.O. Box 788
Port Ewen, NY 12466
Phone: (914) 331-0770
Key: M; G, F, D, LPGr, L
Subs: Amos Post Inc.
Paramount Oil Corp.
Arthur P. Motzkin, Pres.
Edward J. Weber, Jr., Gen. Mgr.

Kingston Oil Supply Corp.
Box 48
Rhinebeck, NY 12572
Richard Kullmann, Div. Mgr.
C. B. Scism, Svc. Mgr.
Edward J. Weber, Jr., Opns. Mgr.

■KIRSCHNER BROS. OIL CO.
569 W. Lancaster Ave.
Haverford, PA 19041
Phone: (215) 527-4200
Key: M; G, F, D, L
Subs: Kirschner Bros. of New Jersey
Michael S. Kirschner, Pres.
Frederick M. Kirschner, Exec. VP
William R. Naylor, Supply Mgr.

■KITTIE PETROLEUM, INC.
155 So. W.W. White Rd.
San Antonio, TX 78219
Phone: (512) 333-2510
Key: M; G, D, L
Sub. of River City Corp.

■KMOCO OIL CO.
P.O. Box 40516
Grand Junction, CO 81504
Phone: (303) 242-0900
Key: M; G, Fw, D, L
Keith J. Messinger Jr., Pres.

■KOCH INDUSTRIES, INC.
P.O. Box 2256
Wichita, KS 67201
Phone: (316) 832-5500
Key: R-M; Gw, Fw, LPGw
Subs: Koch Refining Co.
Koch Marketing Co.
Koch Fuels, Inc.

Koch Refining Co.
P.O. Box 43596
St. Paul, MN 55164
Phone: (612) 437-0700
Key: R-M; Gw, Fw, LPGw
W. W. Hanna, Chmn.
B. A. Paulson, Pres.
C. R. Swyers, Exec. VP

Koch Marketing Co.
P.O. Box 2315
Wichita, KS 67201
Phone: (316) 832-5285
Subs: Hudson Oil of Dela.
X-Cel Oil Co.
B. G. O Neal, Pres.
Robert K. Michael, VP

Koch Fuels, Inc.
P.O. Box 2256
Wichita, KS 67201
Phone: (316) 832-5210
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Gloucester City, NJ 08030
Phone: (609) 456-6673

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Phone: (612) 437-9663

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P.O. Box 307
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Houston, TX 77002
Phone: (713) 651-0741

Los Angeles
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Suite 927
Century City, CA 90067
Phone: (213) 553-6410

Elberta
P.O. Box 188
Elberta, MI 49628
Phone: (616) 352-9678

Wood River Oil & Ref. Co.
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Wichita, KS 67201
Phone: (316) 832-5210
Charles R. Swyers, Pres.
Jim Artale, VP, East Coast Reg.
Jack O'Brien, VP, Upper Midwest Reg.
Jack Thornton, VP, Gulf Coast Reg.

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St. Paul, MN 55165
Phone: (612) 437-8400

Dubuque Terminal
Dubuque Oil Co.
P.O. Box 921
Dubuque, IA 52001
Phone: (319) 582-8883

■KOCOLENE OIL CORP.
1725 East Tipton St.
Seymour, IN 47274
Phone: (812) 522-2224
Robert R. Myers, Pres.
F. Pat Myers, Chmn.
Robert L. Prather, Exec. VP
Gary F. Myers, Sr. VP

■KRAUSE GENTLE OIL CORP.
Box 537
Hampton, IA 50441
Phone: (515) 456-4703
Key: M-Kerr-McGee, Derby, D-X, Apco, Shell; G, F
Subs: Solar Transport
Krause Gentle Oil Corp.
North Iowa Oil Co.
Tri-Iowa Oil Co.
Allison Corp.
T. S. Gentle, Chmn. & Sec.
W. A. Krause, Pres. & CEO
D. D. Van Horn, VP
R. F. Jackson, VP
Keith C. Conover, Controller
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■THE KUNZ OIL CO.
5200 Eden Circle
Edina, MN 55436
Phone: (612) 920-9373
Key: M; G, D
Walter M. Kunz, Jr., Pres.
James E. Ford, VP
Eugene Lovimen, VP
Dirk P. Vogel, Sec. Treas.
Pat Doubek, Sls. Mgr.

■KWIK SHOP, INC.
734 E. 4th
Hutchinson, KS 67501
Phone: (316) 669-8504
Key: M; Gr, Dr
Sub. of Dillon Companies Inc.
Robert L. Meyers, Pres.
Gary Pfannenstiel, Mktg. Dir.
Steve Smith, Petroleum Dir.
David Cleeves, Real Estate Dir.
Clifford Dick, Mgr. Petroleum Equip.

■La GLORIA OIL & GAS CO.
P.O. Box 2521
Houston, TX 77252
Phone: (713) 759-3131
Key: I; Gw, Dw, Fw, LPw
Sub. of Texas Eastern Corp.
Sub: McMurrey Pipeline
Wayne G. Rolf, Pres.
Robt. T. Blanchard, Exec. VP
L. B. Gatewood, VP, Mktg.
D. W. Worden, Gen. Sls. Mgr.
J. N. Davis, Credit Mgr.

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Robert W. Ward, Sls. Supv.

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E. M. McSpadden, Sls. Supv.

Seymour, IN 47274
P.O. Box 401
Phone: (501) 945-7115
C. L. Basil, Sls. Supv.

Tyler, TX 75701
P.O. Box 840
Phone: (214) 595-4511
C. W. Mason, Sls. Supv.

Mobile, AL 36605
Brookley, A.I.C.
Phone: (205) 432-9779
R. L. Pitman, Sls. Supv.

Scott City, MO 63780
P.O. Box 55
Phone: (314) 264-4101
Clifford Selke, Sls. Supv.

■LAKE SHORE OIL CO.
6666 S. Harlem
Summit-Argo, IL 60501
Phone: (312) 767-7300
Key: M; G, D, L
Subs: Tri-America Oil, Inc.
John F. Busch, Pres.
Douglas Griffin, Mktg. VP
Richard Kruke, Lube Oil Mgr.

■LAKESIDE REFINING CO.
P.O. Box 909
Kalamazoo, MI 49005
Phone: (616) 343-1574
Key: T-R-M; Gw, Fw, Dw
Marvin Fleischman, Pres.
Willis E. Perigo, Exec. VP

■LAKETON REFINING CORP.
P.O. Box 1465
Douglasville, GA 30133
Phone: (404) 949-9333
Key: R-M; Fw
Sub. of Southern Independent Oil & Ref. Co.
James P. Young, Pres.
E. G. Schroeder, Exec. VP
John E. McCauley, VP
Joseph P. Rebone, Plant Mgr.

■LAND O' LAKES
P.O. Box 1395
800 53rd Ave. NE
Minneapolis, MN 55440
Phone: (612) 571-2110
Key: I; G, D, F, LPG, L
Subs: Petroleum Resources, Inc.
Ralph Hofstad, CEO & Pres.
Duane Halvorson, Exec. VP
Don Kirksey, VP Mktg.
Al Giese, VP Supply
Lee Morin, Mktg. Mgr.
Bill Wernimint, Supply Mgr.
Foster Hemstock, Mktg. Mgr. LPG

■LANDSEA OIL CO.
1671 Reynolds Ave.
P.O. Box 19603
Irvine, CA 92714
Phone: (714) 250-0940
Key: O; Gw
Donald L. Olson Jr., Pres.
Geuy E. Burghoff, Exec. VP
Morse C. Deming, VP Supply Mktg.
Robert Gardner, West Coast Supply Coord.
Terry M. Pinney, Gulf Coast Supply Coord.
David Tracht, VP Terminals Opns.

■LAWES COAL CO.
Sycamore Ave.
Shrewsbury, NJ 07701
Phone: (201) 741-6300
Key: M; Gr, Dr, Fr, Lr
Donald E. Lawes, Jr., Pres. & CEO
Donald E. Lawes, III, Exec. VP

■CARLOS R. LEFFLER
Box 278
Richland, PA 17087
Phone: (717) 866-2105
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Carlos R. Leffler, Pres.
John Byler, Exec. VP
Donald Noll, TBA Mgr.
Patrick Castagna, Admin. VP
Robt. Blecker, Mgr. Pet. Prods.
Ammon Martin, Sls. Rep.
Dave Morrisey, Credit Mgr.
Michael Bollinger, Mgr. Opns. & Trans.
Paul Hedin, Lube Eng.

■LEHIGH PETROLEUM SUPPLY CO. LTD.
One Terminal Way
Norwick, CT 06360
Phone: (203) 889-1311
Key: T-M; F
Thomas Castle, Pres.
Steven M. Castle, Exec. VP
Peter H. Castle, Secty.

■J. A. LEONE & SONS
296 Broadway
P.O. Box 528
Lawrence, MA 01842
Phone: (617) 687-7101
Key: M; Fr
Joseph A. Leone, Jr., Pres. & CEO
Joseph A. Leone, III, Gen. Sls. Mgr.
Kenneth A. Leone, Mgr. Retail Sls.
Donald E. Beote, Credit Mgr.

■LE PAUL OIL CO.
P.O. Box 578
Troy, OH 45373
Phone: (513) 335-5631
Key: M; G, D
Frank Shapiro

■LIDO CO. OF NEW ENGLAND
New Zealand Rd.
Seabrook, NH 03874
Phone: (603) 474-5551
Key: T-M; G, Fr, D, LPGr, L
Carl A. Pescosolido, CEO & Pres.
William B. Pescosolido, VP Gen. Sls. Mgr.

■LI'L GENERAL STORES
5303 So. Macdill Ave.
Tampa, FL 33611
Phone: (813) 837-1091
Key: M; Gr
E. Kent Kinard, Pres.
Floyd Simpson, Exec. VP
Robert Ancon, VP Petrol.

■LITTLE AMERICA REFINING CO.
P.O. Box 1529
Cheyenne, WY 82001
Phone: (307) 634-2771
Key: R-M; G, F
Affiliated with Holding's Little America Motels
Sub: Sinclair Marketing
R. E. Holding, Pres. & CEO
Homer F. Bruggerman, Exec. VP
Bill Williams, VP Mktg.
L. M. Resink, Mgr. Fuel Oil & Asphalt
Charles Barlow, Controller
Harold Higginson, Gen. Mgr.
Kenneth Y. Knight, Admin. Mgr.

Sinclair Marketing
P.O. Box 31825
Salt Lake City, UT 84131
Phone: (801) 363-5100
Key: I; G, Dw, Fw, L
Sub. of Little America Ref. Co.
R. E. Holding, Pres.
R. G. Little, VP
Bob Beard, Mgr. Supply & Distrib.
Keith Kirby, Mgr. Trans.
M. L. Rensink, Mgr. Asphalt Sls.
John T. Gray, Credit Mgr.

■LUBRIPLATE DIV.
FISKE BROTHER'S REFINING CO.
129 Lockwood St.
Newark, NJ 07105
Phone: (201) 589-9150
Key: P-M; Lw
Fred Snyder, Jr., Pres. & CEO
H. C. Littrell, VP Mktg.-West
J. F. Cusack, VP Mktg.-East, Gen. Sls. & Adv. Mgr.
A. E. Kontak, VP, Gen. Mgr.-Toledo Plant

■THE LUBRIZOL CORP. FUEL PRODUCTS GROUP
29400 Lakeland Blvd.
Wickliffe, OH 44092
Phone: (216) 943-4200
Key: O-fuel additives;
Thomas E. Johnston, Dir.
Joseph E. Gross, Sls. Mgr.
Robert C. Tupa, Product Mgr.

■LYDEN OIL CO.
739 Andrews Ave.
Youngstown, OH 44501
Phone: (216) 744-3118
Key: M-Amoco; G, D, L
W. G. Lyden, Jr., Pres.
W. G. Lyden, III VP, Toledo Div.
Jim Valicenti, Mgr., Comm'l. Sls.

■M.F.A. OIL CO.
200 So. 7th St.
Columbia, MO 65201
Phone: (314) 442-0171
Key: M; G, F, D, LPG, L
Subs: MFA Petroleum Co.
Dale H. Creach, Pres.
J. G. Cunningham, VP Admin.
Paul Dittmer, Asst. VP Opns.
Dwight Alley, Asst. Mktg. Mgr.
William D. Harris, Mgr. LPG Sls.
William Thoms, Acctg. Mgr.
Ron Benne, Credit Mgr.

M.F.A. Petroleum Co., Mid-South Div.
P.O. Box 9216
Memphis, TN 38109
Kent Farmer, Mgr. Mid-South Div.

■MACMILLAN RING-FREE OIL CO.
90 Park Ave.
New York, NY 10016
Phone: (212) 867-0250
Key: R-M; Gw, Dw, F, L
Subs: Southern California Refg. Co.
  Waller Petroleum Co.
  Macmillan Petroleum (Arkansas) Inc.
Robert A. Collier, Chmn.
John M. Shaheen, Pres. & CEO
William Soudriette, Sr. VP
L. F. Marino, VP, Mktg.
Jesse Taub, VP
Dominick C. Perla, Brand Mgr.

Macmillan Petroleum (Arkansas)
301 N. Washington Ave.
El Dorado, AR 71730
Phone: (501) 863-5191
Joe D. Walk, Sr. VP
Preston Young, Credit Mgr.
William Ricks, Sls. Mgr. Lubr. Prod.
Berry Rabun, Sls. Rep.
J. A. Sturdivant, Ref. Mgr.

California Div.
2365 E. Sepulveda
Long Beach, CA 90081
Phone: (213) 595-4695
James H. Lopeman, VP & Gen. Mgr.
Kenneth Clark, Crude Buyer

Waller Petroleum Co.
200 E. Joppa Rd.
Towson, MD 21204
Phone: (301) 825-6100
Conrad Boyle, Exec. VP
Paul L. Sansone, Treas.

■MAIN BROS. OIL CO.
318 Delaware Ave.
Delmar, NY 12054
Phone: (518) 439-7605
Key: M-Citgo; G, D, Fr, L
William Vincent, Pres. & CEO
Clark E. Zeh, Exec. VP and Treas.
Ronald Von Ronne, Sls. Mgr.

■MAJOR BRANDS DISTRIBUTING
600 So Main St.
Butte, MT 59701
Phone: (406) 723-5419
Key: T-M; G, D, LPG, L
Subs: Town Pump
Thomas F. Kenneally, Pres.
Kevin J. Kenneally, VP Purch.
Ronald R. Roos, Gen. Mgr.
Daniel J. Kenneally, Opns. Mgr.

■MANASSAS ICE & FUEL CO.
9009 Center Street
Manassas, VA 22110
Phone: (703) 368-3121
Key: M; G, F, L
Subs: MIFCO
  Manassas Frozen Foods
Harry J. Parrish, CEO
Harry J. Parrish II, Pres.
Frank J. Parrish, Exec. VP

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale, retail
F	Fuel Oil, wholesale, retail
D	Diesel, wholesale, retail
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r	retail only

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■**MAPCO PETROLEUM INC.**
P.O. Box 2930
Memphis, TN 38101
Phone: (901) 774-3100
Key: R; Gw, Fw, Dw
Sub. of Mapco Inc.
R. G. Alexander, VP Ref.
Larry Smith, Admin. Mgr.
L. G. Diehl, Gen. Mgr. Opns.
J. W. Huggins, Eng. Mgr.

■**MARATHON PETROLEUM CO.**
539 S. Main Street
Findley, OH 45840
Phone: (419) 422-2121
Key: R-M; G, F, D, LPGw, Lr
Sub of U.S. Steel Corp.
V. G. Beghini, Pres.
G. N. Nicholson, VP Mktg.
W. E. Lindsey, Pricing & Allocation Mgr.
M. J. Kidd, Mgr., Retail Mktg.
E. S. Markel, Sls. Mgr., Retail Mktg.
G. R. Fisher, Adv. Mgr., Retail Mktg.
A. R. Charnes, Related Mdse. Mgr., Retail Mktg.
H. L. Thomas, Opns. Mgr., Retail Mktg.
R. E. White, Mgr., Whlsl. Mktg.
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G. S. Wassum, Mgr., Mktg. Operations
W. J. Martz, Products Supply & Distr. Mgr.
W. E. MacDonald, Lubricants & Svcs. Mgr.
R. E. Lodico, Tech. Svcs. Mgr.
L. McManness, Mktg. Engr. Mgr.
A. J. Moorhead, Term & Transp. Mgr.

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Park Ridge, IL 60068
480 S. Northwest Hwy.
R. L. Bell, Northern Reg. Mgr., Whlsl. Mktg.

Southfield, MI 48037
26400 Lahser Rd.
H. W. Collins, Midwest Asphalt Sls. Mgr., Whlsl. Mktg.

Birmingham, MI 48012
2205 Holland Ave.
C. A. Risser, Mgr., Detroit Fuel Oil Sls., Retail Mktg.

Champaign, IL 61820
505 S. Neil St.
J. F. Grant, District Mgr., Retail Mktg.

Columbus, OH 43228
4125 Fisher Rd.
L. E. Marlow, District Mgr., Retail Mktg.

Southfield, MI 48037
26400 Lahser Rd.
W. T. Slade, District Mgr., Retail Mktg.

Indianapolis, IN 46224
1304 Olin Avenue
R. W. Povolock, District Mgr., Retail Mktg.

■**MARSHALL OIL CO.**
P.O. Box 1128
Wake Forest, NC 25787
Phone: (919) 556-6111
Key: T-M; G, D
Sub: Wake Auto Parts & Salvage
  Kinergy Research & Development
H. K. Marshall, Pres.
E. Worley Massey, Gen. Sls. Mgr.

■**MARTIN OIL MARKETING, LTD.**
4501 W. 127
Alsip, IL 60658
Phone: (312) 385-6500
Key: M-Blending; G, D, F
Affs.: Martin Oil of Indiana, Inc.
  Martin 4 Min. Auto Salon, Inc.
Carl C. Greer, Pres. & CEO
J. M. Hamilton, VP Mktg.
J. Kirkland Greer II, VP Supply & Trans.
R. Gene Voyles, VP Ret. Opns.

■**MAUGER & CO.**
38 Springfield Rd.
Aldan, PA 19018
Phone: (215) 622-3300
Key: M-Wm Penn; G, D, F, LPGr, L
Sub: Simpson Oil Corp.
Clyde A. Mauger, Jr., Pres. & CEO
Clyde A. Mauger, III, Exec. VP
Phillip Robinson, Treas.
Michael F. McGowan, Sls. Mgr.

■**McCALL OIL & CHEMICAL CORP.**
808 S. W. 15th Ave.
Portland, OR 97205
Phone: (503) 228-2600
Key: M; G, F, D, L
Subs: Great Western Chemical Co.
  Chemax Inc.
  Power Plant Engineers
Robert H. McCall, CEO
Charles L. Campbell, Pres.
James Weir, VP Mktg.
Dean A. Prusse, Mgr. Supply & Trans.
Ron D. Vavak, Mgr. Supply & Trans.

Great Western Chemical Co.
Portland Corp. Off.
808 S. W. 15th Ave.
Portland, OR 97205
Phone: (503) 228-2600
Ernest McCall, Pres.
C. Coop Jones, Dir., Purchasing

Chemax, Inc.
2106 W. 24th
Portland, OR 97210
G. E. Anderson, Mgr.

■**McDOWELL OIL SERVICE**
223 W. 8th St.
Bloomsburg, PA 17815
Phone: (717) 784-6691
Key: M; G-Arco, F
John L. McDowell, III, Pres. & CEO
Larry H. Moss, Gen. Sls. Mgr.

■**McLEIEER OIL**
1718 E. Michigan
P.O. Box 2094
Kalamazoo, MI 49003
Phone: (616) 343-7677
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Peter Buis, Exec. VP
Forrest Scott, Gen. Sls. Mgr.

■**MEENAN OIL CO.**
6800 Jericho Tpke.
Syosset, NY 11791
Phone: (516) 364-9030
Key: M; G-Mobil, F-Chevron, Mobil, Gulf, Texaco, Exxon, Getty, Sun
Subs: Burke Fuel & Heating Co., Inc.
  Canby Oil Co.
  Home Comfort Oil Heat
  Love Oil Corp.
  Petrolube Inc.
  Young Supply Co.
  Effron Fuel Oil Co.
  Paul J. Haight & CO.
  Oil Products Inc.
  Hudson Valley Petroleum Prod.
  Menexco, Inc.
  Rediflo Corpot, NJ
  Spain Oil Co., Inc.
Divs.: Johnson-Cramer Oil Co.
  Christy-Halsey Oil Co.
  Jesse E. Terry Co.
  Springfield Oil Co.
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George Leibowitz, VP-Supp. Dist. & Pres., Menexo
Stanley R. Orczyk, VP-Opns.
Paul A. Vermylen, Jr., VP-Finance & Treas.

■**MERCHANTS OIL**
105 S. Cherokee St.
Denver, CO 80223
Phone: (303) 733-4627
Key: M-Phillips; G, F, D, LPGr, L
Subs: Service Oil Co.
  Space Oil CO.
Geo. W. Calkins, Pres.
B. H. Calkins, Exec. VP

■**MERCURY OIL CO.**
80 Burbank Rd.
P.O. Box M
Wethersfield, CT 06109
Phone: (203) 563-0302
Key: T-M-Amoco; G, F, L, D
Sub. of Northeast Petroleum, Chelsea MA. (100%) Charter Oil Co.
Yves Bilodeau, Plant Mgr.

■**MERIT OIL CORP.**
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Haverford, PA 19041
Phone: (215) 527-7900
Key: M; Gr, Dr
Sub. of the Meadville Corp.
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Ivan H. Gabel, Exec. VP & COO
Leonard E. Gilmar, Sr. VP-Finance & Treas.
Richard E. Pate, VP-Sales
Charles Clayton, Jr., Dir. of Merch. & Prod. Development
S. P. Russo, Real Estate Mgr.
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Morton Craine, Asst. Sec. & Counsel
James F. Parsons, Controller & Asst. Treas.
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S. Kirtland Bass, Supply & Distrib. Mgr.
Dominick DeBenedictis, Engineering Mgr.

New England Div.
274 Main St.
Reading, MA 01867
Phone: (617) 942-1096
C. Leon Carruthers, Div. Mgr.
Robert Williams, Sls. Mgr.

New York Div.
14 Front St.
Hempstead, NY 11550
Phone: (516) 292-1000
George Steininger, Div. Mgr.
Charles Blanchet, Sls. Mgr.
Gary R. Jerome, Sls. Mgr.

Mid-Atlantic Div.
551 West Lancaster Ave.
Haverford, PA 19041
Phone: (215) 527-7900
William L. Kalin, Jr., Div. Mgr.
James W. Larzelere, Sls. Mgr.

■**MERRITT TRAUX**
205 Columbia St., N. E.
Salem, OR 97303
Phone: (503) 588-0455
Key: T-M; G, D, F, L
Michael Traux, Pres.
Peter F. Meyer, Gen. Mgr.
Paul Farrell, Gen. Sls. Mgr.
James Wechter, Controller
Dianne Munley, Credit Mgr.
Gilbert Wood, Trans. Mgr.
Dave Embertson, Off. Mgr.

Columbia Sales
205 Columbia St., N. E.
Salem, OR 97303
Jim Ahmed, Gen. Mgr.

■**MICO OIL CO.**
P.O. Box 2423
Shawnee Mission, KS 66201
Phone: (913) 236-4142
Key: M; Gr-Mico
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Jerald A. Klinock, Exec. VP
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Mike Smittle, Secty., Treas.

■**MID CONTINENT SYSTEMS, INC.**
310 Mid Continent Plaza
P.O. Box 1370
West Memphis, AR 72301
Phone: (501) 735-4295
Key: I; G-M.C., D, F-M.C., LPG, L
Subs: U-Serv Petroleum
  Brownsville Truck Stop, Inc.
  Mid Continent Inns, Inc.
D. G. Seago, Jr., CEO
Tom Lawhorn, Senior VP
Robert Craig, VP, Retail Sales Div.
Garry Kyzar, Gen. Sls. Mgr.
Marvin Shoemake, Adv. Mgr.

■**MIDLAND COOPERATIVES INC.**
(See Land O Lakes)

■**MID-MISSOURI OIL CO.**
P.O. Box 167
Eldon, Mo 65026
Phone: (314) 392-5231
Key: M-Shell; G, D, L
Clark F. Houghton, Pres.
Wayne Compton, VP

■**MID-STATES PETROLEUM**
2146 Livernois Ave.
Troy, MI 48084
Phone: (313) 528-3577
Key: T-M; G-Union, Total, Independent, D, F-Union, Total, Independent, L
Subs: Capitol City Oil Co.
  Markline Oil Co.
  Spade Fuel Oil & Supply
  Save-U Stations, Inc.
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J. M. Butler, Exec. VP
H. P. Butler, VP Mktg.
F. E. Hutton, Gen. Sls. Mgr.
J. J. Hester, Supply/Distrib. Mgr.
B. R. Hardin, Opns. Mgr.

■**MIDWEST PETROLEUM CO.**
6760 Southwest
St. Louis, MO 63143
Phone: (314) 647-5550
Key: M; G, D, L
Sub: Bolch Oil Co.
Louis M. Levin, Pres.
Bud Levin, Exec. VP, Mktg.
Bill Hopkins, Gen. Sls. Mgr., Trans. Mgr.
Lee Goddard, Opns. Mgr.

■**MILDER OIL CO., INC.**
26th & Dorcas, Box 3707
Omaha, NE 68103
Phone: (402) 342-2111
Key: M; Gw, F, Dw
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Thomas F. Bird, Gen. Mgr.
Thomas Durcell, Mktg.

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Thomas A. Miller, Pres. & COO
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■**MILLER & HOLMES**
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St. Paul, MN 55101
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Key: M; Gr, Dw, Fw
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Anthony W. Homes, VP
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■**MILLER OIL CO.**
150 S. Main St.
Norfolk, VA 23523
Phone: (804) 543-5751
Key: M; G, F, D, L
A. C. Miller, Pres. & CEO
J. G. Miller, Sls. Mgr.

■**MILLER OIL CO.**
1033 South Ave.
Toledo, OH 43609
Phone: (419) 243-8111
Key: T-M; G, F, D, L
Ross E. Miller, Owner
William L. Berry, Gen. Mgr.
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Gene A. Warmann, VP
Robert Cavin, Whlsl. Sls. Mgr.

■**MOBIL CORP.**
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New York, NY 10017
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Rawleigh Warner, Jr., Chmn. & CEO
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Mobil Oil Corp.
150 E. 42nd St.
New York, NY 10017
Phone: (212) 883-4242
Allen E. Murray, Pres.

Mobil Oil Corp.
Marketing & Refining Division
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New York, NY 10017
Phone: (212) 883-4242
P. J. Hoenmans, Pres.

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U.S. Marketing & Refining Division
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Fairfax, VA 22037
Phone: (703) 849-3000
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R. G. Weeks, Exec. VP
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P. E. J. Engel, Mgr., Retail
H. J. Gulbrandsen, Mgr., Whlsl.
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G. A. Gruber, Mgr., Lube Tech. Svc.
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T. B. Newman, Resale Sls. Mgr.

Central Resale Region
600 Woodfield Drive
Schaumburg, IL 60196
R. W. Laughton, Gen. Mgr.
M. D. FitzWilliam, Resale Sls. Mgr.

Western Resale Region
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Los Angeles, CA 90017
R. J. Niermeyer, Gen. Mgr.
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Headquarters Comm. Sales
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Fairfax, VA 22037
C. W. Frisby, Mgr.

Resale Lubes
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Fairfax, VA 22037
E. D. Bryant, Mgr.

Northern Comm. Region
600 Woodfield Drive
Schaumburg, IL 60196
K. R. Fernlund, Region Mgr.

Southern/Western Comm. Region
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Suite 600
Dallas, TX 75240
I. W. Jordan, Region Mgr.

■MOHAWK OIL CO. LTD.
The Mohawk Bldg.
325-6400 Roberts St.
Burnaby, B. C. V5G 4G2
Phone: (604) 299-7244
Key: I, M; G, D, LPG, L
Sub. of Mohawk Oil Canada Ltd.
Subs: Payless Oil Co. Ltd.
MacDonald Fuel Products Ltd.
Donald G. Skagan, Pres.
Malcolm A. Christie, Sr. VP Mktg.
Donald M. Stuart, VP Mktg. Svcs.
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J. Punch, Gen. Mgr. Prairie Region

Prince George
P.O. Box 1870
Prince George, B. C.
Phone: (604) 962-8414

Kamloops:
112 Whiteshield Crescent
Kamloops, B. C. V2E 1H1
Phone: (604) 372-5416

Nanaimo:
3412 Littleford Rd.
Nanaimo, B.C. V9G 4E2
Phone: (604) 758-0746

Calgary:
Bow Valley Square III
255 5th St. S. W.
Calgary, Alberta T2P 3G6
Phone: (403) 265-3600

Calgary:
#210-7220 Fisher Street S. E.
Calgary, Alberta T2H 2H8
Phone: (403) 252-3361

Calgary:
7121 Fairmount Dr., S. E.
Calgary, Alberta T2H 0X6
Phone: (403) 252-3361

Saskatoon:
205 Central Ave.
Saskatoon, Saskatchewan S7N 2E8
Phone: (306) 374-6834

Winnipeg:
275 Holden Ave.
Winnipeg, Manitoba R2J 0J3
Phone: (204) 233-0451

Edmonton:
Parkway Village
Suite 200
8170 50th St.
Edmonton, Alberta T6B 1E6

■MONARCH OIL & SUPPLY CO.
P.O. Box M800
Gary, IN 46401
Phone: (219) 886-9216
Key: M; G, D, F, L
Robert B. Bailey, Pres. & CEO
F. T. Stinson, VP & Opns. Mgr.
C. Martinie, TBA Mgr.

■MOORE & MUNGER
140 [illegible]erman St.
Fairfield, CT 06430
Phone: (203) 259-7861
Key: I; Dw, Fw, Lw
Subs: Charles J. Wood Pet. Co.
Cross Oil & Refg. Co.
Cross Development Co.
S. T. Van Esselstyn, Chmn.
David A. Rosow, Pres. & CEO
Victor C. Braun, Group VP Ref.
Wayne G. Granquist, Group VP Prod.
A. W. "Bill" Clinger, VP Mktg.
Harry M. Farnham, VP Res.
Henry L. Levkoff, Asst. to Pres.

Cross Oil & Refining Co. of Arkansas
P.O. Box 105
Smackover, AR 77162
Phone: (501) 725-3611
N. P. "Bud" Hudson, Sr. VP
Denny McConathy, VP & Gen. Mgr.

■E. L. MORGAN CO.
512 E. Main
P.O. Box 1545
Jackson, TN 38302
Phone: (901) 424-3545
Key: T-M-Chevron; G, D, Fw, L
John E. McCutchen, Pres. & CEO
Mrs. Kate D. Morgan, VP
Joe Cheatham, Mgr., Retail Sls.
Clois Hill, Opns. Mgr.

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale, retail
F	Fuel Oil, wholesale, retail
D	Diesel, wholesale, retail
LPG	Liquefied petroleum gas wholesale, retail
L	Lubricants, wholesale, retail
w	wholesale only
r	retail only

■MUNFORD, INC.
1860-74 Peachtree Road, N.W.
P.O. Box 7701-Station C.
Atlanta, GA 30357
Phone: (404) 352-6641
Key: M; Gr, Dr
Subs: Majik Market Convenience Stores
World Bazaar Import Stores
Dillard Munford, Chmn. & CEO
Russell C. Fellows, Pres. & COO
James M. Carroll, Exec. VP-Finance
Hiram F. Griffies, Exec. VP-Opns.
Joseph W. Harding, VP Treas.
Jay E. Rubel, VP, Admin.
Mark Ploss, Controller, Majik Markets
David Miles, Construction Mgr.
Woody McFarlin, Director of Petroleum Opns.
Ron Floyd, VP Mktg.
Bill Schwartz, VP Personnel
Bob Erisman, Advertising Mgr.

Tampa Region:
315 S. Parsons Ave.
Brandon, FL 33511
Phone: (813) 685-2981
Richard Garner, VP
Morris Costello, Sls. Director
Dave Dickmeyer, Sls. Mgr.

Nashville Region:
1100-A Tuckahoe Drive
Nashville, TN 37207
Phone: (615) 868-8334
Hillman Cagel, VP
Ron Barton, Sls. Director
Oliver Jones, Sls. Mgr.

Atlanta Region:
2467 Windy Hill Road
Marietta, GA 37207
Phone: (404) 952-4442
Randy Tipmore, VP
Elton Cannady, Sls. Director
Marty Williams, Sls. Mgr.

Pensacola Region:
4298 Bonway Dr.
Pensacola, FL 32504
Phone: (904) 476-6560
Joe Nicholson, VP
Dwight Whitlow, Sls. Director
Dennis Nelson, Sls. Mgr.

Central Region:
1860-74 Peachtree Rd., NW
P.O. Box 7701-Station C.
Atlanta, GA 30357
Jim Livingston, VP
Fred Mulford, Sls. Director
Ralph White, Sls. Mgr.

■MURPHY OIL USA, INC.
200 Peach Street
El Dorado, AR 71730
Phone: (501) 862-6411
Key: I; G-Spur, D, F-Spur, LPGw, Lw
Subs: Murphy Oil Co., Ltd.
Murphy Eastern Oil Co.
Ocean Drilling and Exploration Co.
Charles H. Murphy, Jr., Chmn.
Robert J. Sweeney, Pres., CEO
Jack W. McNutt, Exec. VP
John L. Solomon, VP, Mktg.
Paul C. Bilger, VP, Mfg.
Jack W. Brewer, Sls. Mgr.
John F. Crowley, Mgr., Prod. Supply & Distribution
Frankie L. Sayers, Prod. Supply Mgr. (Southern Reg.)
Graydon T. Simmons, Prod. Supply Mgr. (Northern Reg.)
Frank E. Massey, Mgr., Terminal Opns.
T. M. Murphy, Mgr., Mktg. Svcs.
Bob J. Thompson, Credit Mgr.

Memphis, TN Reg.
5864 Ridgeway Pkwy.
Suite 216
Phone: (901) 761-2810
J. Maurice Peel, Mgr.

Atlanta, GA Reg.
1831 Independence Square
P.O. Box 888303
Dunwoody, GA 30338
John E. Darby, Mgr.

Minneapolis, MN Reg.
4600 West 77th St.
Suite 304
Phone: (612) 835-3611
James F. Rawlings, Mgr.

Spur Oil Co. Ltd.
P.O. Box 499
One Westmount Square
Montreal, Que. H3Z 2Z8
Phone: (514) 931-8292
Key: T-M; G-Spur, D, F-Spur, L
Sub. of Murphy Oil Co., LTD.
R. Farquharson, CEO
N. Di Tomaso, Pres.
F. G. Archambault, VP, Mktg.
B. A. Bastien, Reseller Sls. Mgr.
A. Paliotti, Ret. Sls. Mgr.
J. H. McElligott, Real Estate Administrator
A. W. Grant, Mgr., Logistics
R. J. Couvillion, Controller

■MUSKET CORP.
P.O. Box 26210
Oklahoma City, OK 73120
Phone: (405) 751-9000
Key: M; G, D, Lr
Subs: Love's Country Stores
High Plains Development Corp.
Mesa Verde Development
Tom E. Love, Pres. & CEO
Larry Dillard, VP Opns.
Jim R. Rager, VP Finance
Windell Pearson, Real Estate Mgr.
Martin Ruff, Construction Mgr.
Terry Ross, Motor Fuels Mgr.

■NATIONAL CONVENIENCE STORES
P.O. Box 758
100 Waugh Dr.
Houston, TX 77007
Phone: (713) 863-2200
Key: M; Gr, Dr, Lr
V. H. Van Horn, Pres.
Tom Ewens, Exec. VP
Jerry Welch, Exec. VP
Robert Chromosta, Gasoline Opns. Mgr.

■NATIONAL COOPERATIVE REFINERY ASSN. (CENEX)
P.O. Box 1404
McPherson, KS 67460
Phone: (316) 241-2340
Key: I; Supplies products to owner companies only: Gw, Dw, Fw, LPGw
Owned by: Farmland Industries, Inc., Kansas City, MO
Farmers Union Central Exch. (CENEX), St. Paul, MN
Growmark, Inc., Bloomington, IL
Land O'Lakes, Inc., Minneapolis, MN
MFA Oil Co., Columbia, MO
Larry E. Williams, Pres. & CEO
R. A. (Ron) Berke, VP, Supply & Trans.
C. W. McNaul, Distr. Mgr.
Melvin Bergen, Prods. Invoice Supvr.
Clyde Olson, LPG Coord.

■NATIONAL OIL & GAS
P.O. Box 476
Bluffton, IN 46714
Phone: (219) 824-2220
Key: M; G, F, D, L
Subs: National E & R National Oil Corp.
J. D. Kipfer, Controller & CEO
Wm. Moser, Pres.
Wm. Gene Moser, Exec. VP
Ed Alberding, Gen. Sls. Mgr.

■NATIONAL PETROLEUM SALES
3105 E. Skelly Dr.
Tulsa, OK 75105
Phone: (918) 749-7741
Key: M; Gw, Fw, Dw, Lw
John Neas, Pres.
W. Carl Wing, VP Contr.
David C. Punnett, Mgr. Supply & Distrib.
J. R. Owens, Mgr. Waterborne Supply & Distrib.
Wally Hawthorne, Mgr. Trans.

■NAVAJO REFINING CO.
P.O. Drawer 159
Artesia, NM 88210
Phone: (505) 748-3311
Key: R-M; Gw, Dw, Fw, LPGw
Sub. of Holly Corp.
Jack P. Reid, Pres.
W. J. Gray, Gen. Sr. VP Mktg. & Supp.
Gordon Bussey, VP Mktg.

■NEAL, INC.
1330 Gembler Rd.
P.O. Box 20427
San Antonio, TX 78220
Phone: (512) 337-8490
Key: M; Gr-Fina, Dr
H. Doak Neal, Pres. & CEO
H. D. Neal, Exec. VP

■**NEWELL OIL CO.**
Box 390
Alpine, TX 79831
Phone: (915) 837-3322
Key: T-M; G-Gulf D, F-Gulf, L
Lee Cowell, Pres. & CEO

■**NEWHALL REFINING CO.**
P.O. Box 938
Newhall, CA 91322
Phone: (805) 259-2660
Key: R-M; Gw, Dw, Fw
Sub. of Pauley Petroleum Co.
R. J. Kerr, Pres.
K. T. Kenny, Sr. VP Mktg.
H. J. Mangold, VP, Mfg.

■**NEW LENOX GAS & OIL CO.**
125 West Maple St.
New Lenox, IL 60451
Phone: (815) 485-2112
Sheldon Hauck

■**NOCO ENERGY CORP.**
P.O. Box 86
Tonawanda, NY 14151-0086
Phone: (716) 874-6200
Key: M, O-processor; G, F, D, L
Donald F. Newman, Chmn.
Reginald B. Newman II, Pres.
Douglas A. Bradt, VP Indus. Fuel Oil Mktg.
William Bingham, Mgr. Natl. Accts.
Davied Colosimo, Trans. Fuel Mkt.
Gary G. Roesch, Opns. Mgr.
Tim Hartnett, Service Station Supvr.
Patricia A. McCord, Secty.
Ken Vaughn, Home Heat Gen. Mgr.
Robert L. Newman, Mgr. Info. Svcs.

■**NORTHEAST PETROLEUM CORP.**
(Acquired by Charter Oil Co. In 1983).

■**NORTHVILLE INDUSTRIES CORP.**
35 Pinelawn Road
Melville, NY 11747
Phone: (516) 293-4700 & (212) 591-1400
Key: T-M; G, Fw, Dw
Sub: Northville Dock Pipeline Corp.
  Northville Consolidated Corp.
  Northville Linden Terminal Corp.
  Bonaire Petroleum Corp.
  Petroterminal de Panama, S.A.
  Pelican Terminal Corp.
Harold P. Bernstein, Chmn.
Raymond Bernstein, Pres.
Jay Bernstein, Exec. VP
R. D. Zelek, VP Reg. Sls.
Gary W. Druckenmiller, VP Terminalling
Earl Espeland, Mgr., Terminal Opns.
Marge Tschiember, P.R. Div.

■**OASIS PETROLEUM CORP.**
5901 Green Valley Circle
Culver City, CA 90230
Phone: (213) 642-0100
Key: T-M; G, D, Fw
Subs: AgriFuels Inc.
  Oasis Petroleum Corp.
Paramount Petrol.
Finn Moller, Pres. & CEO
Assam Khashoggi, Dir.
Parker Anderson, Exec. VP & Gen. Mgr.
W. J. Francis, Exec. Assistant to the Pres.

■**OIL SERVICE CORP.**
200 Boylston St.
Chestnut Hill, MA 02167
Phone: (617) 332-8330
Key: M; Gw, Dw, Fw
Sub. of First Petroleum Corp.
Alfred Slifka, Pres.
Paul J. Harwood, VP & Gen. Mgr.
Richard O. Knox, VP, Mktg.

■**OILS, INC. PETROLEUM GROUP**
300 W. Washington St.
Chicago, IL 60606
Phone: (312) 236-6300
Key: T-M; G, D, F, L
Sub. of Henry Crown Co.
Sub: Stickney Terminal Corp.
  Oils, Inc./Houston
  W. H. Barber Co.
Byron S. Weil, Pres. & CEO
Mariclaire Stubbs, Asst. to Pres.
Neele Stearns, Exec. VP
Jim Bender, Sls. Mgr.

Oils, Inc./Houston
652 E. North Belt
Houston, TX 77060
Phone: (713) 999-5353
Don Ball, Mgr., Gulf Coast

Stickney Terminal Corp.
4100 S. Laramie
Cicero, IL 60650
Phone: (312) 242-3378
Patricia Poplawski, Mgr. Supply (OILS, Inc.)

W. H. Barber Co.
3650 S. Homan Ave.
Chicago, IL 60632
Phone: (312) 523-0250
Key: M, L
Jim Bender, Sls. Mgr.
Tom Knet, Chemist
Bob Driscoll, Plant Mgr.

■**OPERATORS HEAT, INC.**
1601 W. 41st St.
Baltimore, MD 21211
Phone: (301) 467-6000
Key: M; D, F-Orange
J. Hollis B. Albert, Chmn.
J. Hollis B. Albert, Jr., Pres.
William Bass, Jr., Gen. Sls. Mgr.
J. Hollis B. Albert III, Secty.

Lawn Spray Div.
Thomas Shields, Mgr.

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Fire Starter Div.
J. Hollis B. Albert, Jr.

■**ORLEANS OIL CO.**
P.O. Box 51817
Lafayette, LA 70505
Phone: (318) 234-2357
Key: T-M; G-Phillips "66", D
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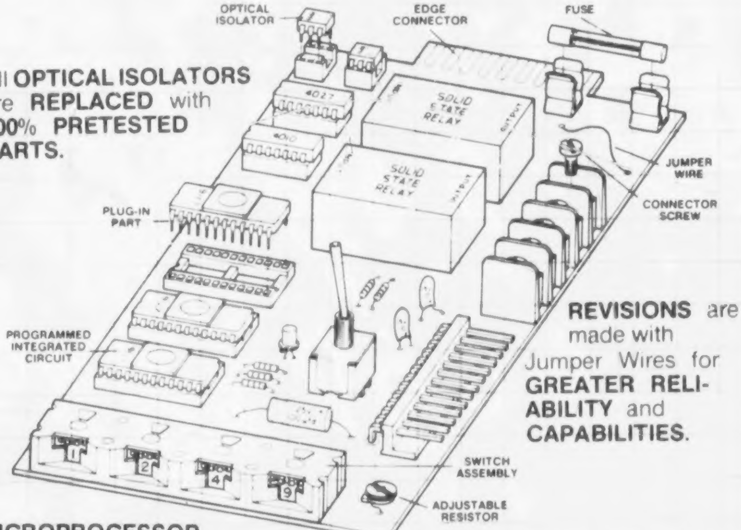

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Phone: (918) 358-2541
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Carl S. Carnes, CEO
C. Dwain Carnes, Pres.
Jack B. Haley, Exec. VP
E. R. Callison, Mktg. VP
C. H. Richardson, Crude Oil
Purchasing, VP

■**OSCEOLA REFINING CO.**
P.O. Box 517
West Branch, MI 48661
Phone: (517) 345-3500
Key: M; Gr, Dr
Sub. of Texas American Oil Corp.
William Judd, Pres.
R. J. Shoemaker, Exec. VP

■**PACER OIL CO.**
1430 South Utica
Tulsa, OK 74145
Phone: (918) 585-9200
Key: M; G, D, L
Robert Parker, Pres. & CEO
Francine Parker, Exec. VP
Fred Wick, VP

■**PACIFIC NORTHERN OIL CORP.**
1100 Olive Way, Suite 1800
Seattle, WA 98101
Phone: (206) 382-9777
Key: M; G, Dw, Fw, L
R. Bruce Merrell, Pres. & CEO
Scott H. Clark, & Dale J. Trapp, Exec. VP
Frank Moore, VP Mktg.
John W. Sykes, Asst. VP-Marine Sls.
Doug Wells, Mgr. Indust. Sls.
Norm Sather, Mgr. Retail Mktg.

■**PACIFIC PETROLEUMS, LTD.**
(Acquired by Petro-Canada Exploration.)

■**H. H. PARK, INC.**
See Halsted-Quinn Fuel Co.

■**PARKER OIL CO. INC.**
P.O. Box 120
South Hill, VA 23970
Phone: (804) 447-3146
Key: M, O-terminal operator;
G, F, D, L
Sub: First Energy Corp.
Lewis W. Parker, Jr., Pres. & CEO
Charles F. Parker, Exec. VP
Lofton D. Allen, VP Mktg.
William A. Hudson, Mgr., Retail
M. G. Daniel, Mgr., Whlsl. Sls.

■**PATTERSON ENERGY GROUP**
185 Magnolia Ave.
P.O. Box 300
Floral Park, NY 11002
Phone: (212) 347-6606
Key: M; Fr
Subs: Patterson Energy Group
Stephen J. Patterson, Jr., CEO
Stephen J. Patterson, III, Pres.
James B. Patterson, Exec. VP

■**PEAVEY OIL CO.**
P.O. Box 787
McMinnville, OR 97128
Phone: (503) 472-6138
Key: I, T, M; G, F, D, LPG, L
Patricia Phillips, Pres.
Elaine Turpeinen, VP

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale, retail
F	Fuel Oil, wholesale, retail
D	Diesel, wholesale, retail
LPG	Liquefied petroleum gas wholesale, retail
L	Lubricants, wholesale, retail
w	wholesale only
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■**PEERLESS DISTRIBUTING CO.**
Tower 14 Suite 1160
21700 Northwestern Hwy.
Southfield, MI 48075
Phone: (313) 559-1800
Key: M; G, F
Marvin Fleischman, Pres.
Steven Robinson, Secy.
Jeffrey Fleischman, Mktg. Sls.

Peerless Petroleum Co.
Galleria Tower-815E.
5065 Westheimer
Houston, TX 77056
Phone: (713) 871-0111
Dale F. Goy, VP & Gen. Mgr.
Jane A. James, Dir., Aviation Fuels
Mktg. Sls.
Cheryl Ann Powers, VP Mktg. Sls.

■**PENNSYLVANIA PETROLEUM PRODUCTS CO.**
Front & Shunk Sts.
Philadelphia, PA 19148
Phone: (215) 467-2600
Key: O-compounder blender; Lw
Herbert L. Steinberg, Pres. & CEO
Marc H. Steinberg, Exec. VP
Norman Schwartzman, Gen. Sls. Mgr.
B. Perry, Export Mgr.

■**PENNZOIL PRODUCTS CO.**
Pennzoil Place
P.O. Box 2967
Houston, TX 77001
Phone: (713) 236-7878
Key: I; G, F, L, D
T. W. Warren, Chmn. & CEO

■**PESTER CORP.**
303 Keosauqua
P.O. Box 10006
Des Moines, IA 50306
Phone: (515) 282-5000
Key: T-R-M; Gr, Dr, Fr, Lr
Subs: Pester Marketing Co.
Pester Marketing Northern
Pester Marketing Southern
Pester Refining Co.
Petroleum Special Inc. of Iowa
Jack C. Pester, CEO Chmn.
C. R. Worman, Pres.
J. G. Fletcher, Exec. VP, Legal Counsel
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TWX: 710-996-5973
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INLAND WATERWAY DIVISION:
2100 L&A ROAD
METAIRIE, LA 70181
PHONE: 504-833-1463
TWX: 810-951-6061

GULF COAST DIVISION:
1404 SO. HOUSTON-PASADENA RD.
PASADENA, TEXAS 77502
PHONE: 713-477-8171
TWX: 910-881-1751

WEST COAST DIVISION:
115 AVALON BLVD.
WILMINGTON, CA 90744
PHONE: 213-549-7990
TWX: 910-345-6391

Larry W. Alberty, VP-Mgmt. Svcs.
Richard S. Snider, VP Pub. Afrs.

Pester Marketing Companies
303 Keosauqua
P.O. Box 10006
Des Moines, IA 50306
Phone: (515) 282-5000
Jack C. Pester, Chmn.
C. R. Worman, Pres.
Clyde Varney, Controller

Pester Marketing Northern
303 Keosauqua Way
P.O. Box 10006
Des Moines, IA 50306
Robert D. Schmadeke, Exec. VP
Pete Brown, Sls. & Merch. Mgr.
N. G. Frantz, Const. Mgr.
Wes Fouche, Maint. Mgr.

Pester Marketing Southern
7700 East Araphoe Rd. Suite 180
Englewood, CO 80112
Jack Scurlock, Exec. VP
Jim Risdon, Sls. & Merch. Mgr.

Pester Marketing Co.
6905A Blue Ridge
Raytown, MO 64133
Phone: (816) 358-4500
Jack Scurlock, Exec. VP
Denny Holdgrafer, Sls. & Merch. Mgr.

Pester Refining Co.
P.O. Box 10006
Des Moines, IA 50306
Key: P-T-R; Gw, Dw, Fw, LPGw, Lr
Jack C. Pester, Chmn.
Jerry R. Allen, Pres.
Glenn R. Schneider, Group VP-Crude & Supp. Sls.
Nathan Yates, Controller
Earl Williams, Mgr. Crude Supply
E. D. May, Mgr. Supp. Dist.
James B. McKay, Credit Mgr.
Wm. C. Courtney, Whsle Rep.-Northern Reg.

Pester Refining Co.
P.O. Box 751
El Dorado, KS 67042
Phone: (316) 321-4800
Randy Newcomer, Mgr.
Dale George, Mgr. Asph. & Heavy Fuel Sls.

Pester Refining Co.
6905A Blue Ridge
Raytown, MO 64133
Phone: (816) 358-4500
Ernie Rohr, Mgr. Light Oil Sls.
Gregg Waack, Whsle. Rep. Cent. & West. Reg.

■WM. R. PETERSON OIL CO.
276 Main St.
Portland, CT 05480
Phone: (203) 342-3560
Key: M-Mobil; F
Ernest F. Peterson, Pres.
J. Paul Peterson, VP
William Peterson, Fuel Oil Mgr.
Mark Peterson, VP-Sewers
John Di Mauro, VP A

■PETRO-CANADA PRODUCTS INC.
1 Place Ville Marie
Montreal, Quebec H3B 4A9
Phone: (514) 878-7200
Key: I, T, R-M; G, F, D, LPG, L
Sub: Petro-Canada Inc.
W. A. West, Pres.
R. J. Mayo, Sr. VP—Coord. & Devel.
P. Dupuis, Sr. VP—Eastern Reg.
D. G. MacKenzie, Sr. VP—Central Reg.
W. R. Twiss, VP, Western Reg.
R. C. Legge, Dir.—Human Resources

■PETROLEUM MARKETERS, INC.
P.O. Box K-64
Richmond, VA 23288
Phone: (804) 288-4127
Key: T-M; G, D, F, L
Subs: Whiting Oil Co.
PM Terminals, Inc.
PM Transport, Inc.
Stop in Food Stores, Inc.
Ralph G. Roop, Chmn. & Treas.
Lester D. Haisley, Pres.
Billie F. Crowder, VP

Whiting Oil Co.
P.O. Box 13026
Roanoke, VA 24030
Terry M. Phelps, Pres.
Scott Blankinship, VP
Jack Jackson, Credit Mgr.

PM Terminals, Inc.
P.O. Box 34370
Richmond, VA 23234
Lester D. Haisley, Chmn.
John W. Smith, Pres.
C. W. Buchanan, VP
T. Michael Holder, VP

PM Transport, Inc.
P.O. Box 11854
Lynchburg, VA 24506
Lester D. Haisley, Chmn.
John W. Smith, Pres.

Stop In Food Stores, Inc.
P.O. Box 12185
Roanoke, VA 24023
Lester D. Haisley, Chmn.
Terry M. Phelps, Pres.
Scott F. Blankinship, VP
Ronald R. Hare, VP

■PETROLEUM PRODUCTS CORP.
900 Eisenhower Blvd.
P.O. Box 2621
Harrisburg, PA 17015
Phone: (717) 939-0466
Key: M; G, F, L, D
John A. Arnold, Chmn. & CEO
Paul E. Ermlich, Pres. & COO
Donald P. Cook, VP Whlsl.
Jack Kraynıak, Jr., Mgr., Lube Oil Sls.
Tom M. Ca[illegible], Credit Mgr.
Anthony F. Mi[illegible]to, Opns. Mgr.

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Sher-Two, Inc.
Service Station Rentals
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Abraham Slepian, Exec. VP
Joel M. Slepian, VP, Mktg.
Richard Thompson, Treas.
Charles Hoff, Controller

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1033 N. Highway 47
P.O. Box M
Longwood, FL 32750
Phone: (305) 834-8400
Key: M
E. W. Rearwin, Pres.
W. C. Caveny, Exec. VP
Ralph Dillingham, VP, Mktg.

■**PETTWAY OIL CO.**
3324 Alton Park Blvd.
P.O. Box 2068
Chattanooga, TN 37409
Phone: (615) 266-4181
Key: T-M; G, F, D, L
William D. Pettway, Pres. & CEO
Vanessa E. Trimble, VP Admin.
Vivian Lane, Treas.-Fuel Mgmnt. Spec.
Alfred E. Long, Dir. of Sls.
James C. White Jr., Warehouse Mgr.
James C. White, Mgr. Commer. & Indus. Sls.
Henry Apple, Mgr. Farm Sls.
Thomas F. Hixson, Trans. Mgr.
Blondell Blakely, Systems Anal.

■**PHILLIPS FUEL CO.**
432 So. River St.
Hackensack, NJ 07602
Phone: (201) 343-6600
Key: T-M; G-Texaco, D, F, L
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John S. Hendricks, Pres.
G. Williard Phillips, Exec. VP
Martin A. Becker, VP, Sr. Advisor
Louis Puida, Sls. Mgr.
Carl F. Kopmann, Controller
Gary W. Steer, Opns. Mgr.

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Sub: Aero Oil Co.
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J. M. Prentice, Mgr. TBA
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J. L. Hammond, Mgr. Avia.
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Clearwater, FL 33515
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L. A. Jensen, Dist. Mgr.

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Suite 250
Columbus, OH 43085
Phone: (614) 436-2640
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Box 11394, Coral Ridge Stn.
Ft. Lauderdale, FL 33306
Phone: (305) 566-6066
R. W. Friedewald, Dist. Mgr.

Louisville District
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Louisville, KY 40222
Phone: (502) 426-6650
M. L. Jernigan, Dist. Mgr.

Minneapolis District
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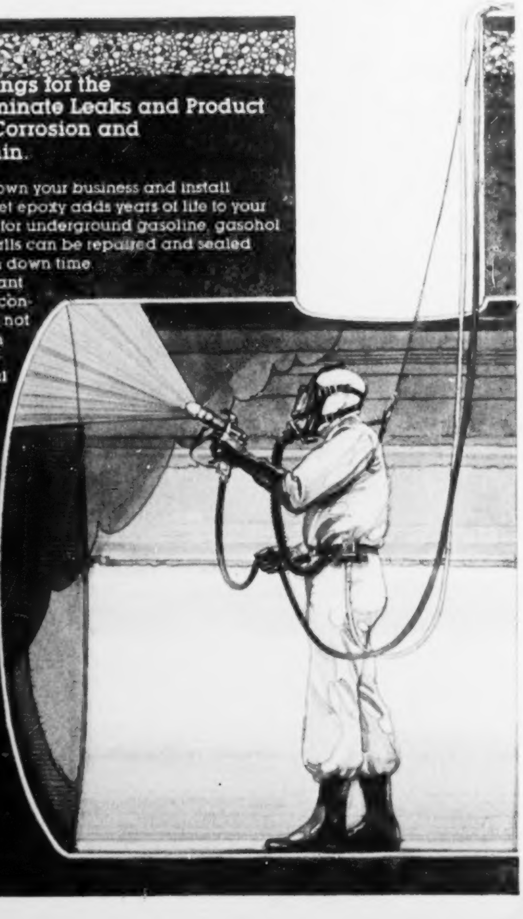
Minneapolis, MN 55431
Phone: (612) 835-6600
V. A. Wenzlaff, Dist. Mgr.

Raleigh District
3117 Poplarwood Ct.
Raleigh, NC 27625
Phone: (919) 876-5024
J. R. Downing, Dist. Mgr.

St. Louis District
300 Ozark Trail Dr., Suite 2100
Ellisville, MO 63011
Phone: (314) 227-6664
R. A. Harling, Dist. Mgr.

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale, retail
F	Fuel Oil, wholesale, retail
D	Diesel, wholesale, retail
LPG	Liquefied petroleum gas wholesale, retail
L	Lubricants, wholesale, retail
w	wholesale only
r	retail only



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Donald F. Schrimpf, Exec. VP
S. Wiley Davis, VP, Mktg. & Gen. Sls. & Adv. Mgr.

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East Orange, NJ 07019
Phone: (201) 673-5000
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Suzenne Davis, VP Secty.
Jesse Davis, Dist. Sls. Mgr.

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7401 Kingston Pike
Knoxville, TN 37919
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James A. Haslam, III, VP Mktg.
William E. Haslam, VP Corp. Devel.
Rex Fox, Controller
Tom Edwards, Reg. Mgr.
J. Meeks, Reg. Mgr.
Ronald Motley, Mktg. Mgr.
Roger Smith, Constr. & Maint. Mgr.
Alan Wright, Trans. Mgr.
Hobert Perdue, Jr., Station Coord.

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Philadelphia, PA 19153
Phone: (215) 727-2100
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Morton Segal, VP
John Cunningham, Gen. Sls. Mgr.

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Dallas, TX 75201
Phone: (214) 741-3081
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Sub. of Placid Oil Co.
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Walter V. Fraker, VP
P. G. Clarke, VP
B. J. Johnson, VP Land
Feather Wilson, VP Geol. & Phys.

Port Allen Refinery
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Port Allen, LA 70767
Phone: (504) 387-0278
C. B. Keys, Plant Mgr.

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Baton Rouge, LA 70806
Phone: (504) 927-5934
Aubrey S. Cox, Mgr., Whlsl. Sls.

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Tallulah, LA 71282
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Ron Hancock, Whlsl. Sls. Rep.

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R. E. Harris, Exec. VP
Jesse O. Brown, VP, Mktg.
Florence A. Morton, Sls. Mgr. Whlsl.
John G. Misoyianis, Sls. Mgr. Lubr.

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175 Sunnyside Bl.
Plainview, NY 11803
Phone: (516) 576-9500
Key: T-M; G, D, Fw, L
Subs: Power Test Pet. Dist.
  Power Test of Connecticut, Inc.
  Power Test of Massachusetts, Inc.
  Power Test of New Jersey
  Power Test Petro Corp.
  Leemilt's Petroleum
  Staten Island Gasoline Corp.
  Clay Oil Terminals, Inc.
  Donna Oil Corp.
  Gasway, Inc.
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Milton Safenowitz, Exec. VP
Louis Cohen, Supply & Distrib.
Herbert Wechsler, VP Sls. Mktg.
Geo. DeForest, VP Real Estate

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Phone: (914) 454-5130
Richard Dexter, Dist. Mgr.

N. J. & Pennsylvania
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No. Plainfield, NJ 07061
Phone: (201) 756-8150
Erhard Zimmer, Dist. Mgr.

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4301 Boston Post Rd.
Phone: (212) 324-5110
Julie Becker, Dist. Mgr.
Sandy Dulitz, Asst. Div. Mgr.

Brooklyn-Queens-Staten Island
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Plainview, NY 11803
Phone: (516) 576-9500
T. J. Breck, Dist. Mgr.

Long Island
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Plainview, NY 11803
Phone: (516) 576-9500
Vic Marchal, Dist. Mgr.

Massachusetts & Connecticut
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West Springfield, Mass. 01089
Phone: (413) 737-8770
James Craig, Dist. Mgr.

Leemilt's Petroleum
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Plainview, NY 11803
Phone: (516) 576-9500
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Milton Safenowitz, Exec. VP
Louis Cohen, VP, Mktg., Supply & Dist.
Herbert Wechsler, VP Sls. & Mktg.
Geo. DeForest, VP, Real Estate

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1925 W. Pioneer Pkwy.
Arlington, TX 76010
Phone: (817) 261-2575
Key: M; G, F, D, L
Homer L. McGinnis, Pres.

■PRIDE OIL CO.
P.O. Box 12028
5414 Clinton Hwy.
Knoxville, TN 37912
Phone: (615) 687-4682
Key: M; Gr, Dr, Fr
Subs: Kelso Oil Co., Inc.
  Magnolia Package Store
  Pride Car Wash
Andrew J. Gettelfinger, Pres.
Earl I. Gettelfinger, Exec. VP
Tom Stooksbury, Gen. Sls. Mgr.
Paul Lawson, Mgr., Retail Sls.

■PRIDE OIL CO.
509 B. Alabama St.
P.O. Box 2344
Columbus, MS 39704-2344
Phone: (601) 328-7757
Key: T-M; G, D, Fw
Eddie B. Byars, Jr., Pres.
Ralph W. Byars, Exec. VP

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Cadillac, MI 49601
Phone: (616) 775-1308
Key: M; G, D
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Larry J. Davy, Exec. VP
Lynda Herdegen, Sec. Treas.

■PUBLIC FUEL SERVICE
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New York, NY 10029
Phone: (212) 722-3000
Key: M; F, D
Subs: Ajax Fuel Corp.
  Baerenklau Co., Inc.
  Donnenfeld Fuel Corp.
  Farrell Fuel Corp.
  Harper Fuel Corp. (See below)
  Heat-Serv. Corp.
Robert B. Greenes, Pres.
Donald J. Mangone, VP & Gen. Sls. Mgr.
Al Schwartz, Credit Mgr.
Joseph Russo, Off. Mgr.

Harper Fuel Oil Corp.
357 E. 116th St.
New York, NY 10029
Donald I. Jaffe, Div. Mgr.

■PUBLIX OIL CO.
3495 Cumberland Club
Atlanta, GA 30339
(404) 436-4335
Key: T, M; G, F, D, Lr
Subs: Dalton Oil Co. Inc.
  Hay Oil Co.
  Publix Distributing Co.
  Scotland Oil Co. Inc.
  Scotland Oil Co. of Ga.
  Tire Dist. Inc.
Robt. O. Casaday, Pres. & CEO
Don Langston, VP Mktg.

Sales Areas:

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P.O. Box 11605
Phone: (615) 584-1533

Nashville, TN 37207
P.O. Box 8131
Phone: (615) 254-3501

■W. H. PUGH OIL CO.
200 Dodge St.
Racine, WI 53402
Phone: (414) 632-4491
Key: M; G, F, L, D
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Sigurd Hegland, VP
W. H. Pugh, Jr., P.L.T. Mgr.

Sylvania Oil Co.
13709 Old Hall
Sturtevant, WI 53177
Joyce Blaser, Div. Mgr.

■PYRAMID OIL CO.
140 County Rd.
Tenafly, NJ 07670
Phone: (201) 568-9630
Key: M; G, F, D
Sub: Pyramid Fuel Oil Co.
Victor Cinu, Pres.
Glenn Zomack, VP
Charles Waldron, Sls. Mgr.

■QUAKER STATE OIL REFINING CORP.
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Oil City, PA 16301
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Key: I; Gw, Dw, Fw, Lw
Subs: Corn Brothers, Inc.
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  Texstar Automotive Group, Inc.
  Truck-Lite Co., Inc.
  The Valley Camp Coal Co.
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C. J. Shelkey, Mgr., Coatings Dept.
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C. L. Wilbert, Mgr., Export Sls.
W. T. Roseblade, Mgr., Sls. Coord. & Trng.
P. F. Petraglia, Adv. Mgr.
D. E. Grumling, Asst. Treas., Gen. Credit Mgr.
T. C. Maxwell, Mgr., Customer Svcs. Dept.
J. P. Pearson, Gen. Mgr., Sterling Oil Div.
G. W. Freeman, Opns. Mgr., Sterling Oil Div.
J. N. Campbell, Jr., Sls. Mgr., Sterling Oil Div.

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Phone: (404) 799-7212
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H. M. Ellenburg, Pres. & COO
R. E. Hardesty, VP, Sls.
J. M. Shields, VP, Equipment & Chemical Sls.

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St. Louis, MO 63134
Phone: (314) 521-3900
Key: T-M; L
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D. L. Brisk, VP & Gen. Mgr.
P. O. Hampton, VP, Fin. Sec. Treas.
M. A. Miller, Gen. Mgr., Dir. Mktg.
J. P. Cernicky, Dir. Opns.

Quaker State, Inc.
P.O. Box 549
Burlington, Ont., Canada L7M 1T3
Phone: (416) 335-5577
Key: M; Lw
J. W. Cooper, Pres. & COO
D. B. Barratt, VP, Sls.

■QUALITY OIL CO.
Box 2736
Winston-Salem, NC 27102
Phone: (919) 722-3441
Key: T, M; G, F, D, L
Subs: Gas House Co.
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B. L. Bennett, Jr., Gen. Partner
J. K. Glenn, Jr., Gen. Partner
Graham Bennett, Gen. Partner
B. R. Beck, Sls. Mgr.
J. S. Blackwelder, Credit Mgr.
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Rocky Nolen, Dir. of Finance
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Greenville, NC 27834
P.O. Box 815
Charles Gaskins, Mgr.

Mt. Airy, NC 27030
P.O. Box 609
Gary Neugent, Supvr.

Statesville, NC 28677
P.O. Box 22
Gray Fowler, Mgr

Southern Pines, NC 28387
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Gas House Co.
P.O. Box 2736
Winston-Salem, NC 27102
Jimmy Harbour, Supvr

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Fredericksburg, Virginia 22403
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D. E. Quarles Jr., CEO
Ben Wafle, Treasurer
John McIntyre, Opns. Mgr.
Gary McEntee, Controller
Stuart Fears, Gen. Mgr., Quarles Petroleum, Fredericksburg
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Thad Green, Gen. Mgr., Quarles Petroleum, Harrisonburg
Wayne Rountree, VP, Mgr., Quarles-Robertson Oil, Fairfax
Rolfe Robertson, III, Sales Mgr. Quarles-Robertson Oil
D. E. Quarles III, Gen. Mgr., Quarles Petroleum, Front Royal
Mike Cason, Gen. Mgr., Quarles Oil of Culpeper

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Quincy, MA 02169
Phone: (617) 773-2500
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Subs: Deepwater Oil Terminals, Inc.
Quincy Oil Service Stations Consolidated, Inc.
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William G. Kiniry, VP Gen. Mgr.
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Louis J. Bagley, Credit Mgr.

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Carrollton, TX 75006
Phone: (214) 243-4854
Key: M; G-Phillips, D, L
W. H. Quortrup, Pres. & CEO

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Atlanta, GA 30348
Phone: (404) 434-0400
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Melville, NY 11747
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Sub. of Tartan Oil Corp.
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P.O. Box 787
Richmond, KY 40475
Phone: (606) 623-6705
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P.O. Box 3500
Phone: (213) 519-7696, 775-8251
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Donald T. Jones, Pres.
John D. Miessner, Admin. VP
Al Metz, Plant Mgr.

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Hackensack, NJ 07601
Phone: (201) 488-6600
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■REINHARDT OIL CORP.
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Phone: (607) 432-6633
Key: M; G, F, D, LPG, L
Subs: Reinhardt-Andrus Co.
Corner Food Stores, Inc.
Robert E. Serig, Pres. & CEO
Rudy Ballard, Exec. VP
Dave Harder, Gen. Mgr. Fuel Oil Sls.

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Hicksville, L.I., NY 11802
Phone: (516) 931-6800
Key: M; Fr
Malvin Sevin, CEO
Erik Sevin, Pres.
Larry Caputo, Gen. Mgr.

■REPUBLIC OIL CORP.
22514 Ventura Blvd.
Woodland Hills, CA 91364-1464
Phone: (818) 888-7532
Key: M; G, D
Sub: Dixxie Diesel Truck Stops
Richard A. Baldinger, Pres.
J. T. Helsom, Exec. VP

■REMOTE SERVICES—(See Conna Corp.)

■RESEARCH FUELS, INC.
P.O. Box 8229
Horseshoe, TX 78654-8229
Phone: (515) 598-8539
Key: M; Gr, Dr

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale, retail
F	Fuel Oil, wholesale, retail
D	Diesel, wholesale, retail
LPG	Liquefied petroleum gas wholesale, retail
L	Lubricants, wholesale, retail
w	wholesale only
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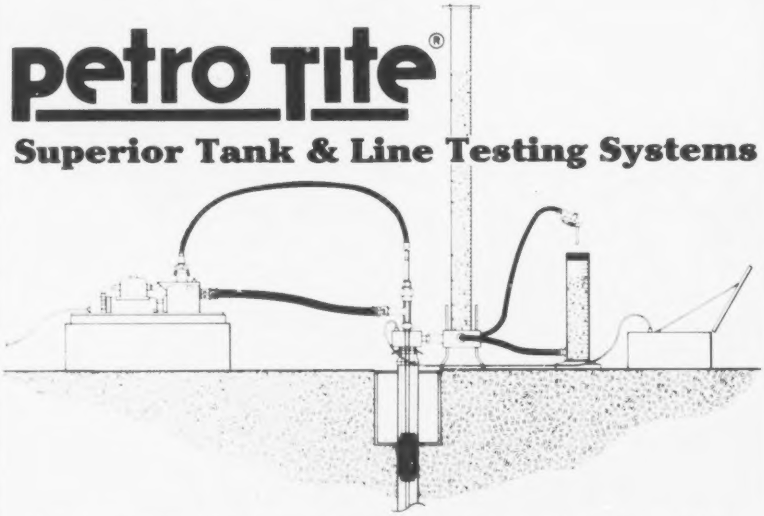

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Phone: (305) 523-5911
Key: M; G
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Jerry M. Porter, Jr., VP
Leroy K. Dellinger, VP

■REYNOLDS INDUSTRIES, INC.
33 Mt. Auburn St.
Watertown, MA 02172
Phone: (617) 924-4650
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Subs: Port Oil Corp.
  Port Oil Corp. Northeast
  Port Food Stores
Phillip L. Reynolds, Pres. & CEO
David G. Reynolds, Exec. VP

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8500 Georgetown Rd.
Indianapolis, IN 46268
Phone: (317) 875-8500
Key: M; Gr, Dr, Lr
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W. B. Conner, Exec. VP
Richard Jones, VP
Dallas Simon, VP

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Memphis, TN 38113
Phone: (901) 948-8538
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A. Seth Roberts, VP Sls.
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Daniel Copenhaver, Car Wash Opns. Mgr.
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San Jose, CA 95129
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Thomas L. Robinson, VP
Gerald C. Cummings, Retail Mgr.
John E. Kloster, Controller

■ROCK ISLAND REFINING CORP.
5000 W. 86th St.
Indianapolis, IN 46268
Phone: (317) 872-3200
Key: R-M; G, D, F
Subs: Rock Island Resource Co.
  R. I. Marketing
William E. Huff, Pres.
F. W. Grube, Exec. VP
J. P. Hofer, VP Fin.
John E. D. Boudler, Mgr. Whlsl. Sls.
D. L. Musolino, Mgr. Nat'l Accts.

Tulsa Oil Corp.
Box 2069
Livonia, MI 48151
Phone: (313) 525-4500
Key: M; Gr, Dr, Fr
Louis E. Kincannon, Pres.
Dallas H. Simon, Exec. VP

Colonial Oil Co.
P.O. Box 6280
Fort Wayne, IN 46802
George O. Bitler, Pres.

Golden Imperial, Inc.
P.O. Box 68410
Indianapolis, IN 46268
L. E. Kincannon, Pres.
W. B. Connor, III, VP

United Oil Service
5436 Brookville Rd.
Indianapolis, IN 46219
M. R. Dellen, Pres.
E. L. Winkler, VP

■ROCKET OIL CO.
P.O. Box 9022
Canton, OH 44711
Phone: (216) 452-7945
Key: M; Gw-Rocket
Donald C. Coen, Secty.

Diamond Service Stations
P.O. Box R
Macon, GA 31202
Phone: (912) 742-0985
Key: M; Gr
John F. Rogers, Jr., CEO
Ed Norwood, Pres.

■ROSS RESOURCES, INC.
310 West Central, Suite 121
Wichita, KS 67202
Phone: (316) 264-6113
Key: M; G, D, L
Ron R. Ross, Pres.
James T. Ross, VP

■RYAN-DeWITT CORP.
4088 Pearl St. Road
Batavia, NY 14020
Phone: (716) 343-4444
Key: M; G-Chevron, F-Hess, United, L-Chevron
Subs: Albion Oil Co.
  L. W. Stroup Corp.
Neil T. Burns, Pres. & CEO
Elsie F. Ryan, Secty.-Treas.
Bruce Briggs, Mgr., R D C O Div.
W. W. Judkins, Asst. Treas.
Lewis Grasso, Opns. Mgr.
Richard Sikes, VP TBA

■SMO, INC.
Box E
La Plata, MD 20646
Phone: (301) 934-8101
Key: M-Texaco, BP, Arco; G, D, F, L
Subs: Delmarva Oil
J. Blacklock Wills, Pres.
C. F. Boyers, Sr. VP
J. B. Wills Jr., VP Mktg.
J. Binette, M.F. Mgr.
J. Combs, C-Store Mgr.
B. Hawthorn, Auto. Aftermkt. Mgr.
J. Fox, Personnel Mgr.
J. Gateau, Heating Fuels Mgr.
M. Adams, Credit Mgr.

■S-S-G CORP.
615 Second St.
Hudson, WI 54016
Phone: (715) 386-5157
Key: M; Gr, L
Burt Nordstrand, Pres. & CEO
Gail Nordstrand, Dahlstrom, Exec. VP
Donald C. Dahlstrom, Gen. Sls. Mgr.
Larry K. Hopkins, Controller
Steven L. Cross, Maintenance Mgr.
Richard W. Johnson, Mdse., Mgr.

■SAHARA OIL CO.
P.O. Box 6574
Phoenix, AZ 85005
Phone: (602) 253-2159
Key: M; G, D
Robert L. Ragel, Pres.

■SAN ANN SERVICE
P.O. Box 618
Boaz, AL 35957
Phone: (205) 593-4286
Key: M; G, D
H. K. Scott

■SANTA FUEL
154 Admiral St.
Bridgeport, CT 06605
Phone: (203) 367-3661
Key: M-Mobil; F
Sub: Inland Fuel Terminals
S. George Santa, Pres.
Norman K. Santa, Exec. VP
Robt. F. Benn, Gen. Sls. Mgr.
John S. Santa, Controller
Donald F. Santa, Opns. Mgr.

■SANTEE OIL CO.
P.O. Box 567
U.S. Hgwy. 52 North
Kingstree, SC 29556
Phone: (803) 354-6131
Key: M; G, F, D, L
W. H. Cox, Pres.
C. G. Bass, VP-Treas., Gen. Mgr.
Joan M. Cox, Secty.
W. A. Edwins, Sls. Mgr.

■SAV-A-LOT GAS CO.
10001 Folsom Blvd.
Sacramento, CA 95827
Phone: (916) 366-3858
Steve Beneto, Jr.

■SAVCO INC.
(Formerly Savco Self-Service, Inc.)
7813 Percival Rd.
P.O. Box 84
Columbia, SC 29206
Phone: (803) 787-8245 799-5472
Key: M; G, LPGr, Lr
L. L. McNair, Pres. & CEO
Charles E. McNair, Exec. Mktg. VP

■SAVE-X, USA
130 Sycamore Ave.
Roanoke, VA 24012
Phone: (703) 342-7885
Key: M; Gr, Dr, Fr
Sub: Serv-n-Save, Inc.
Roy R. Pollard Jr., Pres. & CEO
W. Earle Spruill, Jr., VP & Gen. Mgr.

■SAVINGS OIL CO.
P.O. Box Drawer 1688
Tupelo, MS 38802-1688
Phone: (601) 842-7525

■SAV-MOR OIL CO.
5150 Wilshire Blvd., Suite 400
Los Angeles, CA 90036
Phone: (213) 933-9366
Key: M; G, D, L
James M. Taylor, Pres.
James Fulton, Mktg. VP
Leonard Montgomery, Real Estate Mgr.

■SCHAEFFER OIL
Box 490
Winner, SD 57580
Phone: (605) 842-3509
Key: M; G, D, L
Dwight L. Schaeffer, Pres. & CEO
Brian K. Schaeffer, Exec. VP

■SEARS OIL CO.
1914 Black River Blvd.
Rome, NY 13440
Phone: (315) 337-1232
Key: T-M; G, F, D
Aff: Sears Petroleum & Transport Corp.
H. P. Sears, Sr., Pres. & CEO
H. P. Sears, Jr., VP Mktg. Opns.
T. A. Sears, Gen'l. Sls., Whlsl. Sls. Indus. Cons. Sls. & Fuel Oil Sls.
James Plumb, Mgr. Retail Sls.
James Kittleman, Credit Mgr.
Geo. Brown, Off. Mgr.
David Miller, Auditor

■SELF-SERVICE OIL CO.
P.O. Box 6206
Rockford, IL 61125-1206
Phone: (815) 964-3920
Key: M; Gr, Dr
W. R. Williams, Pres.
W. R. Williams III, VP
C. F. Bergquist, VP
Lois B. Williams, Secty.-Treas.
D. J. Wehrstein, Supvr. Rockford, IL
C. F. Bergquist, Supvr. Poynette, WI
Charles Mosebach, Supvr. WI

■SEMINOLE ASPHALT REFINING CO.
P.O. Box 128
St. Marks, FL 32355
Phone: (904) 224-1194
Key: R; F, D
H. Carl Vaught, Pres.
B. M. Nichols, VP Ref.

■SHAHEEN NATURAL RESOURCES CO.
90 Park Ave.
New York, NY 10016
Phone: (212) 867-0250
Subs: Octane Oil Co.
Robt. A. Collier, Chmn.
John M. Shaheen, Pres. & CEO

Octane Oil Co.
90 Park Ave.
New York, NY 10016
Phone: (212) 867-0250
Key: M; D, F
John M. Shaheen, Pres.
Robt. A Collier, VP, Asst. Secty., Asst. Treas.
Peter L. Caras, VP, Asst. Secty., Asst. Treas.

■SHAVER & McCARTHY INC.
259 E. Lake St.
Wayzata, MN 55391
Phone: (612) 473-7391
Key: M; G, L
Baird Shaver, Pres. & CEO
Craig Shaver, Secty.

■SHELBY PETROLEUM CORP.
P.O. Box 88
LaFollette, TN 37766
Phone: (615) 562-3361
Key: M; G, F, D, L
Subs: Bonus Distributing Co.
  Shelby Custom Construction
  Rainbow Richlands, Inc.
  Shelco Corp.
K. Russell Shelby, Pres. & CEO
L. Joe Herrell, VP Mktg. & Mgr., Gen. Sls. Whlsl. Sls.
Floyd Burris, Mgr. Indus. Cons. Sls. & TBA
W. Don Baker, Mgr. Retail Sls. Mdsg. & Opns.
Patricia Tidwell, Credit Mgr.

■SHELL CANADA LTD.
P.O. Box 400, Terminal A
Toronto, Ont., M5S1E1 Canada
Phone: (416) 597-7111
Key: I; G, D, F, LPG, L
Sub. of Royal Dutch Shell Group
C. William Daniel, Pres. & CEO
D. J. Taylor, Exec. VP
A. G. Seager, VP Mktg.
E. Wende, Mgr. Auto. Mkts.
R. H. Duke, Mgr. Comcl. Mkts.
J. A. Laudenbach, Mgr. Mktg. Opns.
Z. G. Kowal, Mgr. Merchandising
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L. H. Bernard, Mgr. Lub. Bus Centre
W. J. Gregory, Mgr. Dom. Bus. Centre
D. C. Patterson, Mgr. Aviation
R. J. Beveridge, Mgr. Fuels & Asphalt

Central Marketing Region
1500 Don Mills Rd., Ste. 600
Don Mills, Ont. M3B 3K4 Canada
Phone: (416) 447-3392
L. R. Smith, Region Mgr.
J. A. LeFrancois, Auto. Sls. Mgr.

Eastern Marketing Region
Place Ville Marie, Ste. 2000
Montreal P.Q. H3B 4B1 Canada
Phone: (514) 866-7571
P. Gadbois, Region Mgr.
G. N. Betournay, Auto. Sls. Mgr.
F. P. Brais, Comcl. Sls. Mgr.
J. P. Beaudry, Opns. Mgr.

Western Marketing Region
650 West Georgia St.
Vancouver, B.C. V6N 4N8 Canada
Phone: (604) 685-5155
J. G. McIntyre, Region Mgr.
J. M. Lesonsky, Auto. Sls. Mgr.
W. G. Manson, Comcl. Sls. Mgr.
W. Thomas, Opns. Mgr.

■SHELL OIL COMPANY
One Shell Plaza
P.O. Box 2463
Houston, TX 77001
Phone: (713) 241-6161
J. F. Bookout, Pres.
C. L. Blackburn, Exec. VP, E&P
P. J. Carroll, VP Public Affairs
F. H. Richardson, Exec. VP Prod.
D. B. Richardson, Pres. Shell Ref. & Mktg. Co.
J. R. Street, Pres. Shell Chemical Co.
J. W. Schutzenhofer, Gen. Mgr. Mktg.
A. R. Flora, Gen. Mgr. Eastern Reg.
R. Lopez, Gen. Mgr. Western Reg.
E. F. McMahon, Gen. Mgr. Sup. & Trans.
L. L. Osborn, Mgr. Employee Relations Support-Products
J. J. O'Connell, Mgr. Sls. & Bus. Svcs.
Q. P. Graves, Mgr. Lubricants Dept.
J. F. Kelly, Mgr. Reg. Business Center—WOR
R. C. Harrell, Mgr. Reg. Business Center—EOR
S. C. Lancaster, Mgr. Prod. Distrib.
R. H. Garnett, Jr., Head Office Retail Mgr.
W. L. Faulkenberry, Retail Mktg. Mgr.—Western
S. L. Miller, Retail Mktg. Mgr.—Eastern
M. E. Thorne, Retail Mktg. Mgr.—Midcontinent
W. S. Little, Jr., Mgr. Comm. Mktg.
J. A. Rexrode, Mgr. Lubricant Sls.

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Middleburg Heights, OH 44130
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East Coast District
100 Executive Drive
West Orange, NJ 07052
Phone: (201) 325-5497
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Weslayan Tower
24 Greenway Plaza
Suite 711
Phone: (713) 439-1000
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Anaheim, CA 92803
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320 Interstate North Parkway
Phone: (404) 955-4600
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400 Blue Hill Drive
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Phone: (617) 326-8210
G. S. Johnson, Mgr.

Miami District
100 S. Pine Island Rd.
Suite 130
Plantation, FL 33324
Phone: (305) 944-3487
R. L. Cheatham, Mgr.

Nashville, (TN 37204) District
100 Oaks Office Tower
Suite 401
Phone: (615) 383-3124
R. F. Gardner, Mgr.

New Orleans (LA 70150) District
P.O. Box 50698
Phone: (504) 588-4911
G. O. Chadwick, Mgr.

New York District
1 Jericho Plaza
Jericho, NY 11753
Phone: (516) 938-8686
B. P. Vander Mel, Mgr.

Newark District
100 Executive Drive
West Orange, NJ 07052
Phone: (201) 325-5200
W. D. Ramsey, Jr., Mgr.

Tampa (FL 33622) District
P.O. Box 22086
Phone: (813) 877-5741
F. E. Weltz, Mgr.

Washington, DC, Baltimore District
Clark Building
Suite 312
Columbia, MD 21044
Phone: (301) 995-1200
D. R. Healy, Mgr.

White Plains District
2 Corporate Parkway Dr.
Suite 404
White Plains, NY 10604
Phone: (914) 694-1116
H. H. Hewitt, Mgr.

Chicago District
1415 W. 22nd
Oakbrook, IL 60521
Phone: (312) 887-5500
W. F. Butzloff, Mgr. North
J. L. Shanks, Mgr. South

Cleveland District
7123 Pearl Road
Middleburg Heights, OH 44130
Phone: (216) 842-4000
D. P. Archambault, Mgr.

Dallas (TX 75207) District
Stemmons Tower North
Suite 201
Phone: (214) 631-0430
O. W. Brauss, Mgr.

Dayton District
1129 Miamisburg
Centerville Road
Dayton, OH 45449
Phone: (553) 866-5201
R. F. Woodworth, Mgr.

Detroit District
31275 Northwestern Hwy.
Farmington Hills, MI 21044
Phone: (313) 885-9000
G. W. Hadley, Mgr. Outstate
J. B. Uguccioni, Mgr. Metro

Houston (TX 77027) District
P.O. Box 22073
2400 West Loop, Suite 114
Phone: (713) 621-0330
B. T. Baty, Mgr.

Indianapolis (IN 46268) District
8500 N. Michigan Road
Phone: (317) 291-7440
W. J. Beumer, Mgr.

St. Louis (MO 63074) District
500 Northwest Plaza
Suite 1000
St. Ann, MO 63074
Phone: (314) 291-5700
W. R. Cox, Mgr.

East Bay District
3468 Mt. Diablo Boulevard, Suite B103
Lafayette, CA 94549
Phone: (415) 283-4200
T. J. O'Brien, Mgr.

Hawaii District
1441 Kapiolani Boulevard, Suite 1001
Honolulu, HI 96805
Phone: (808) 946-0761
R. L. Wilson, Mgr.

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale, retail
F	Fuel Oil, wholesale, retail
D	Diesel, wholesale, retail
LPG	Liquefied petroleum gas wholesale, retail
L	Lubricants, wholesale, retail
w	wholesale only
r	retail only

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San Bruno, CA 94066
Phone: (415) 952-2250
V. K. Clifford, Mgr.

Northwest District
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Bellevue, WA 98004
Phone: (206) 453-3000
J. M. Biladeau, Mgr.

Southern California District
511 North Brookhurst Street
Anaheim, CA 92803
Phone: (714) 991-9200
J. B. Bird, Mgr.

■SHERER OIL CO.
608 Central
Johnstown, PA 15902
Phone: (814) 535-8441
Key: T, M; G, F
Sub: Ringer Tri-State Oil Co. (30%)
Herbert M. Sherer, Pres.
Gary L. Bellack, VP, Sec.
Louis M. Gjurich, Treas. Asst. Sec.

■SHEPHERD OIL
P.O. Box 100
Morristown, AZ 85342
Phone: (602) 975-1111
Key: R.: Gw
P. Wyman Shepherd, CEO
J. W. Byrns, Pres.
William H. Weathersby, Gen. Mgr.

■SHIPLEY-HUMBLE, INC.
550 East King Street
P.O. Box 946
York, Pennsylvania 17405
Phone: (717) 848-4100
Key: T-M Exxon, Arco, Amoco, G, F, D
W. S. Shipley, II, President
H. C. Zimmerman, Exec. VP
J. F. Freet, Jr., VP-Finance, Sec.-Treas.
G. F. Ioos, Asst. Sec., Credit Mgr.
D. E. Wilson, Mgr.-Supply and Distrib.
R. C. Borden, Jr., Mgr.-Motor Fuels Sls.
W. S. Shipley, III, Retail Fuel Oil Sls. Mgr.
I. E. Baumgardner, Mgr.-Svcs. Dept.

■SHORES OIL CO.
19933 E. Nine Mile Rd.
St. Clair Shores, MI 48080
Phone: (313) 776-2670
Key: M.: Gw-Union, Dw, F-Union, L
Edw. D. Brown, Pres.
Robt. A. Dryden, Exec. VP
Edw. E. Vollenweider, VP

■SHOTMEYER BROS. PETROLEUM CORP.
10 Wagaraw Rd.
Hawthorne, NJ 07506
Phone: (201) 427-1000
Key: M, G, F, D, L
Subs: Shotmeyer Bros. Fuel Corp.
Henry Shotmeyer, Sr., CEO
Charles Shotmeyer, Pres.
Henry Shotmeyer, Jr., Treas.

■SHOTMEYER OIL CORP.
1 Valley Street
Hawthorne, NJ 07506
Phone: (201) 427-8200, (305) 392-8100
Key: M; Gr, Dr
Sub. of Albert Shotmeyer, T.A. ASCO
Subs: Gas Pumpers of America Corp.
  Motorgas Oil & Refg. Co.
Albert Shotmeyer, Pres. & CEO
E. J. Shotmeyer, Exec. VP & Sec.

ASCO TERMINALS:
Syracuse, NY Terminal
Phone: (315) 471-1022
Bernard Hourehan, Mgr.

Hudson, NY Terminal
Catskill, NY Terminal

Fultonville, NY Terminal
Phone: (518) 828-9400
William Wucher, Mgr.

Newburgh, NY Terminal
Phone: (914) 561-6200
Robert Speirs, Mgr.

Wilmington, DE Terminal
Phone: (302) 652-1000

Gas Pumpers of America Corp.
1 Valley Street
Hawthorne, NJ 07506
Phone: (201) 427-8200, 423-1000, (305) 392-8100
Key: M-U Save, Gr, Dr
Sub. of Shotmeyer Oil Corp.
Albert Shotmeyer, CEO
Myron T. Holman, Pres.
Norman R. Steenstra, Exec. VP
Elizabeth J. Shotmeyer, VP

Motorgas Oil & Ref. Corp.
1 Valley St.
Hawthorne, NJ 07506
Phone: (201) 427-8200, 423-1000
Key: M; Gr, Dr
Sub. of Shotmeyer Oil Corp.
Albert Shotmeyer, CEO
Myron T. Holman, Pres.
Norman R. Steenstra, Exec. VP
Elizabeth J. Shotmeyer, VP

■SICO COMPANY
15 Mount Joy St.
Mount Joy, PA 17552
Phone: (717) 653-1411
Key: T, M; G, F, D, L
Sub. of The Sico Foundation
Sub: John G. Stumpf, Inc.
Franklin R. Eichler, Pres. & Treas.
Michael T. Reese, VP Mktg.
Charles W. Ricedorf, VP Opns.
Robert K. Shank, Sec.-Asst. Treas.
Edward F. Zercher, Asst. Sec.-Retail Mktg. Mgr.
Eugene W. Crider, Whlsl. Mktg. Mgr.
Phillip L. Veith, Svcs. Station Mktg. Mgr.
Gary Maxwell, Cust. Svcs. Mgr.

■SIMON OIL CO.
1316 Main Street
Niagara Falls, NY 14301
Phone: (716) 285-9641
Key: M; G-Sunoco, Mobil
Theodore Dimet, Pres.
Eugene Dimet, Exec. VP
Ken Kimmins, Gen. Sls. Mgr.
Peter Barber, C-Stores Supv.

■SIMMONS OIL CORPORATION
8655 Via de Ventura
P.O. Box 4520
Scottsdale, AZ 85261
Phone: (602) 948-7250
Subs: Simmons Crude Oil Co.
  Simmons Refining Corp.
  Simmons Terminal Corp.
Jerry Simmons, Pres. & CEO
Harold Mack, Exec. VP-Corp.
J. D. Wessling, CFO
Glenn Walker, VP & Treas.
Craig Robb, Controller

Simmons Refining Corporation
P.O. Box 4520
Scottsdale, AZ 85261
Phone: (602) 948-7250
J. D. Wessling, Pres.
Dan Ables, Sr. VP Mktg. & Supply
Bob Roehl, VP-Crude

Rocky Mountain Division
P.O. Box 4520
Scottsdale, AZ 85261
Phone: (602) 948-7250
Chuck Carlise, VP
Ted Rabban, Sls. Mgr.

West Coast Division
5150 East Pacific Coast Highway
Suite 680
Long Beach, CA 90804
Phone: (213) 494-7377
Peter Hughes, Supply & Distrib. Coordinator

Northern Division
625 Central Ave. West
Suite 200
Great Falls, MT 59404
P.O. Box 1243
Great Falls, MT 59403
Tom Robitaille, VP Mktg.
Alan Hobbs, Sls. Mgr.
Marcy Stinson, Mktg. Coordinator

Simmons Crude Oil Company
P.O. Box 4520
Scottsdale, AZ 85261
Phone: (602) 948-7250
Bob Roehl, VP

■SINCLAIR MARKETING
P.O. Box 31825
Salt Lake City, UT 84131
Phone: (801) 363-5100
Key: I; G, Fw, Dw, L
Sub. of Little America Ref. Co.
R. E. Holding, Pres.
R. G. Little, VP
Bob Beard, Mgr. Supply & Distrib.
M. L. Rensink, Mgr. Asphalt Sls.
John T. Gray, Credit Mgr.

■SING OIL CO.
P.O. Box 1538
Thomasville, GA 31792
Phone: (912) 226-1211
Key: M; G, D
L. H. Singletary, CEO
Richard Singletary, Pres.
T. E. Perry, Exec. VP
John L. Parker, VP Mktg.
W. D. Strickland, Retail Estate Mgr.

■SINKLER, INC.
650 Knowles Ave.
Southampton, PA 18966
Phone: (215) 357-7100
Key: M; F, D
Subs: Yancey Fuel Oil Co.
  Larry Young Inc.
  B & S Terminals Inc.
A. William Woosnam, Jr., Pres. & CEO
Douglas E. Woosnam, Exec. VP & Treas.
Ross E. Stempel, Jr., Sec.
Richard Greim, Asst. Sec.-Treas.
Eugene Michelson, Sls. Mgr.
Ray Spada, Credit Mgr.

■SITE OIL CO.
7755 Carondelet
St. Louis, MO 63105
Phone: (314) 725-4321
Key: M; Gr, Fr
Alvin Siteman, Pres.
Chris Kemph, VP Mktg.

■SMITH-SHAFER OIL CO.
P.O. Box 680
Rockford, IL 61105
Phone: (815) 965-6767
Key: M; G, Fr, Dr
Ernst S. Shafer, Pres. & CEO
C. Gordon Smith, Sec.

■SOMERSET REFINERY
520 Monticello St.
Somerset, KY 42501
Phone: (606) 679-6301
Key: R-M; G, F, D, L
W. T. Walker, Pres.
T. S. Ballance, VP
Cy Waddle, VP
Merrel Henderson, VP Sls. & Distrib.

■J. R. SOUSA AND SONS
29 Andover St.
Danvers, MA 01923
Phone: (617) 777-1500
TWX 710-347-0889
Key: M; G-BP, D, F, L
Subs: Sousa Oil Co.
Joseph J. Sousa, Pres.
Jerome R. Sousa, Jr., Treas.
T. F. Winstanley, Mgr., Sup. & Distrib.
Louis Arvenites, New Eng. Sls. Mgr.
James Whitaker, Albany Div. Mgr.
Gary Kuzcek, Poughkeepsie Div. Mgr.
Lawrence King, Compt.

Sousa Oil Co.
P.O. Box 935
Troy, NY 12181
Phone: (518) 274-0600

■SOUTHERN COUNTIES OIL CO.
1011 Laguna Rd.
Tustin, CA 92680
Phone: (714) 544-7140
Key: M; G, D, L
Frank H. Greinke, Pres. & CEO
Richard Becktel, Exec. VP Whlsl.
Frank P. Greinke, Exec. VP-Retail
Robert Kennedy, Mktg. VP

■SOUTHERN OIL CO.
P.O. Box 1278
Suffolk, VA 23434
Phone: (804) 539-2374
Key: T, M; G, D
C. P. Holland, Chmn.
David Holland, Pres.
Virginia B. Mehalko, Sec.-Treas.

■SOUTHERN PETROLEUM CO.
(Name changed to Belcher Oil Co. of Tennessee: See Coastal Oil Corp.)

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P.O. Box 980
Hobbs, NM 88240
Phone: (505) 397-3384
Key: T-R-M; G, Fw
Sub. of Southern Union Co.
Randolph Scott, Pres.
W. S. "Bill" Champlin, Sr. VP, Supply & Distrib.
Bill McDonnell, VP Ref. Eng.
Ron Grossarth, VP Mktg.
Frederick E. Hobbs, Controller
Russell Buss, VP Gas Plants

■THE SOUTHLAND CORP.
See Citgo Petroleum Corp.

■SOUTHLAND OIL CO.
5170 Galaxie Dr.
P.O. Box 16668
Jackson, MS 39236
Phone: (601) 981-4151
Key: R-M; G, F, D, L
Chas. W. Else, Chmn.
Roger G. McGrath, III, Pres.
W. D. Saxon, Mgr., Independent Sls.
R. J. Nail, Mgr., Branded Sls.
Shelby Bridges, Mgr., Bulk Plant Sls.
G. P. Montgomery, Mgr., Sup. & Distrib.
Clyde Walters, Mgr., Asphalt Sls.
Charles Barrack, Credit Mgr.

■SPARTAN PETROLEUM CO.
S. Pine St. Ext.
P.O. Box 1170
Spartanburg, SC 29304
Phone: (803) 585-3416
Key: M-Chevron; Gw, F, L
R. E. Mitchell, Pres.
G. E. Mitchell, VP
W. T. Hope, Jr., Sls. Mgr.
M. L. Leverette, Jr., Sec.

■SPEEDWAY PETROLEUM CO.
237 Lunenburg St.
Fitchburg, MA 01420
Phone: (617) 345-4688
Key: M; G, F, L
Donald R. Tucker, Pres. & CEO
Jeff Bridgeman, Mgr., Retail Sls.
June LeMieux, Credit Mgr.
Richard Grant, Opns. Mgr.

■THE SPENCER COMPANIES INC.
P.O. Box 1608
Huntsville, Alabama 35807
Phone: (205) 533-1150
Key: T-M AMOCO, CITGO; G, D, L, (Convenience food stores)
Subs: Alabama Oil Company
  Midsouth Oil Company
  Midsouth Ice Company
  Spencer Food Stores
Guy J. Spencer Jr., Pres. & CEO
Robert E. Adams, Exec. VP
W. A. Henderson, Sr. VP
Sarah Spencer Chappell, VP
Fred C. Reid, VP
William L. Standridge, Sec. Treas.

Alabama Oil Company
P.O. Box 1608
Huntsville, AL 35807
Phone (205) 533-1150
W. A. Henderson, Sr. VP, Gen. Mgr.

Midsouth Oil Company
P.O. Box 583
Fairfield, AL 35064
Phone (205) 744-0020
W. A. Henderson, Sr. VP, Gen. Mgr.

Spencer Food Stores
P.O. Box 583
Fairfield, AL 35064
Phone: (205) 744-0020
Fred C. Reid, VP, Gen. Mgr.

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P.O. Box 1608
Huntsville, AL 35807
Phone: (205) 533-1150
Robert E. Adams, Exec. VP, Gen. Mgr.

■M. SPIEGEL & SONS OIL CORP.
P.O. Box 833
Tuxedo, NY 10987
Phone: (914) 351-4709
Key: M; G, F, D, L
Sub: SOS Oil Corp.
George Spiegel, Pres.
Richard Spiegel, Sec.-Treas.
Albert Silberlicht, Gen. Mgr.
Linda Wilkinson, Off. Mgr.

■C. H. SPRAGUE & SON CO.
One Parade Mall
Portsmouth, NJ 03801
Phone: (603) 431-1000
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Sub. of Axel Johnson Co., New York
Sub. Petroleum Heat & Power Co. of R.I.
H. M. Powers, Pres. & CEO
A. W. Christo, VP, Trans. Supp.
W. Hallowell, VP, Term. Opns.
W. Wells, VP, Fuel Oil Sls.
E. Bulmer, Coal Bulk Hndlg. Sls. Mgr.
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C. Holmes, Term. Supvr.

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Portsmouth, NH 03801
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J. H. Downey, Lt. Oil Div. Mgr.
A. LaBerge, Term. Supvr.

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375 Allens Ave.
Providence, RI
W. G. Low, Jr., Div. Mgr.
J. Dick, Term. Supvr.

Petroleum Heat & Power Co. of Rhode Island
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R. J. Malloy, Pres.

■SPUR PRODUCTS, DIV. OF ULTRAMAR CANADA INC.
C.P. 499, 1 West Mount Square
Montreal, Quebec H3Z 2Z6
Phone: (514) 931-8292
Key: I; G, Fw, D, Lr
Sub. of Ultramar Canada Inc.
Subs: Canadian Ultramar Ltd.
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G. Archambault, Div. VP

■STANDARD CYCLE & AUTO SUPPLY CO. (SCASCO)
22 Rowley St.
Winsted, CT 06098
Phone: (203) 379-3322
Key: T-M; G-Texaco, D, F-Texaco, Exxon, L
Subs: Della Donne Oil Co.
Dodd Oil Co.
Home Oil
Sandmeyer Oil Co.
Milton Dolinsky, Pres. & CEO
David M. Dolinsky, Exec. VP
Geo. Mesloh, VP, Mktg.

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225 Bush Street
San Francisco, CA 94104
Phone: (415) 894-7700
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D. N. Maytum, Sec.
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San Francisco, CA 94105
Phone: (415) 894-7700
Subsidiary of Standard Oil Company of California
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Chevron Asphalt Limited
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D. R. Kestell, VP, Mktg.
K. S. McRae, Mgr., Whlsl. Sls.
R. L. Farbridge, Mgr., Retail Sls.
R. D. Jolly, Mgr., Public Affairs

■STANDARD OIL CO. (Indiana)
200 East Randolph Drive
Chicago, IL 60601
Phone: (312) 856-6111
Key: I; G, D, F, LPG, L
Subs: Amoco Oil Co.

Amoco Oil Co.
200 East Randolph Drive
Chicago, IL 60601
Phone: (312) 856-6111
L. D. Thomas, Pres.
P. D. Collier, Exec. VP
S. G. Van Sickle, Mktg. VP
J. C. Bergman, Gen. Mgr. Mktg.
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R. H. Markley, Mgr. Planning & Eval.

■STANDARD OIL CO. (Ohio)
Midland Bldg.
Cleveland, OH 44115
Phone: (216) 575-4141
Key: I; G, D, F, LPGw, L
Sub. (53%) of British Petroleum Ltd.
Subs: BP Oil, Inc.
A. W. Whitehouse, Chmn.
J. R. Miller, Pres.
Frank E. Mosier, Sr. VP Crude Trading Pres. Sohio Oil
Hugh D. Hanna, Mktg. VP-Retail
J. D. Campbell, Mktg. VP-Whlsl.
H. T. Bubb, Gen. Sls. Mgr.-Retail
R. M. Donaldson, VP, Govt. & Pub Rel.

Marketing Dept.
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J. D. Campbell, Jr., VP Whlsl. Mktg & Distrib.
H. T. Bubb, Sls. Mgr.
N. S. Bartlett, Pricing Mgr.
R. J. Pilari, Mgr., TBA Sls.
C. C. Vittian, Mgr., Lube Mktg.
J. P. Donnell, Mgr., Mountaineer Carbon Co.

Boron Oil Co. and BP Oil Co.
Midland Bldg.
Cleveland, OH 44115
Phone: (216) 575-4141
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Port Huron, MI 48060
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C. A. Kellerman, Pres.
Ed Shreiner, VP-Secty.

■STAR SERVICE & PETROLEUM CO.
P.O. Box 1344
St. Louis, MO 63043
Phone: (314) 434-7100
Key: M; Gr, Dr
Sub: Pep Gas & Wash
John E. Henderson, Pres. & CEO
J. W. Lyles, VP Mktg.
Clayton "Lou" Litillier, VP Supply & Distrib.

■STEUART PETROLEUM CO.
4646 40th St., N.W.
Washington, DC 20016
Phone: (202) 537-8900
Key: M, 0-terminal operator; G, F, D, L
Sub. of Steuart Investment Co.
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Hervey M. Triplett, Sr. Mktg. VP
Wm. E. Meiers, Sr. VP Supply
Thomas V. Gaffney, VP Supply
Harry G. Youngling, VP Retail Fuels
Thomas W. Pryor, VP Finance
F. Peter Horrigan, VP Motor Fuels
Jerry Waggoner, Credit Mgr.
Michael York, Gen. Mgr. Lubes

■STORMY OIL CO.
P.O. Box 1841
St. Cloud, MN 56302
Phone: (612) 251-6272
Key: M; G, F, D, L
Sub. of St. Augusta Oil Co.
Ronald Vukelich, Pres.
Patrick Tracy
James Tracy
Leslie Vukelich, Secty.

■J. D. STREETT & CO.
144 Weldon Pkwy.
Maryland Heights, MO 63043
Phone: (314) 432-6600
Key: M; G, Fw, D, L
Newell A. Baker, Pres. & Chmn.
Kenneth A. Baker, VP
James W. Bernthal, Mgr. Supply & Distrib.
Hugh Watson, VP
Elmer J. Keitel, Mgr. Priv. Packaging & Anti-Freeze
Dan O. Koch, Mgr. Constr. & Opns.

■SUBURBAN OIL CO.
1301 W. 22nd St.
Oak Brook, IL 60521
Phone: (312) 325-9526
Key: M; G, F, D
John H. Curran, Pres.
Clyde F. Todd, Jr., Mktg. VP
James W. Johnston, Secty.
Geo. J. Satala, Mgr. Svcs.
P. G. Marra, Mgr. Adm. Svcs.

■SUBURBAN PROPANE GAS CORP.
334 Madison Ave.
Morristown, NJ 07960
Phone: (201) 540-0300
Key: I; G, D, F, LPG, L
Subs: Plateau, Inc.
Mark J. Anton, Pres., Chmn. & CEO
John H. Nichols, Jr., Exec. VP
William Owen Jr., VP Controller
Gerald M. Becker, Asst. VP
Robert M. Plante, Asst. VP
Virginia L. Molino, Sec. Gen. Counsel

■SUMRALL OIL SERVICES
P.O. Box 525
Bay Springs, MS 39422
Phone: (601) 764-2135
Key: T, M; G, D
James Sumrall, Pres.
Betty Sumrall, Secty. Treas.
W. H. Jackson, Comptroller
J. D. Wilkins, Mktg. VP

■SUN CO.
100 Matsonford Rd.
Radnor, PA 19087
Phone: (215) 293-6000
Key: I; G, D, F, L
T. A. Burtis, Chmn. & CEO
R. McClements, Jr., Pres. & COO
G. E. Hillhouse, Exec. VP
R. P. Hauptfuhrer, Group VP Explor. & Prod.
J. P. Neafsey, Sr. VP Finance
B. N. Rutherford, Sr. VP Human Resources & Admin.
H. T. Snider, Sr. VP Planning & Public Affairs
D. P. Walsh, Sr. VP & Gen. Counsel
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R. A. Paul, Jr., Treas.
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Sun Refining & Marketing Co.
10 Penn Center
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Philadelphia, PA 19103
Phone: (215) 977-3000
Subs: Mohawk Valley Oil, Inc.
Herr Gass & Oil
Mid-State Oil Co.
Kelly Company
Moutour Auto Service Co., Inc.
H. H. Palmer, Inc.
Stop-N-Go Foods, Inc.
Mascot Petroleum Co.
R. H. Campbell, Pres.
H. Alonso, VP
H. Z. Shelton, VP Finance
J. D. Helms, VP Planning
D. E. Knoll, VP Sunoco Mktg.
N. J. Neuhausel, VP Human Res.
J. K. Obold, VP Legal & Gen. Counsel
J. V. D. Fear, VP Fuels
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Boston Div.
498 Concord St.
Framingham, MA 01701
Phone: (617) 875-1371

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5900 Princess Garden Pkwy.
Lanham, MD 20706
Phone: (301) 459-2050

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23999 Northwestern Hwy.
Metro-Center Bldg., Suite 260
Southfield, MI 48075
Phone: (313) 358-2540

Philadelphia Div.
676 E. Swedesford Rd.
Wayne, Pa 19087
Phone: (215) 964-2260

■SUNNY SERVICE STATIONS
P.O. Box 1-U
Eugene, OR 97440
Phone: (503) 746-9614
Key: T-M; G Sunny, D
Alan O. Maxwell, Pres.
Ellis Emery, VP
Thomas Golden, VP

■SUNOCO INC.
56 Wellesley Street West
Toronto, Ontario M5S 2S4
Phone: (416) 924-4111
Key: T-R-M; G-Sunoco, D, F-Sunoco, LPG, L
Sub. of Suncor Inc.
W. R. Loar, Pres. & CEO
Stanley A. Cowtan, Exec. VP, Sunoco Group
C. K. Bolend, VP Mktg.
W. W. Gibson, Mgr. Rtl. Sls. Gas
E. E. Clements, Mgr. Adv. & Mer.

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Lana Jane Brent, Pres.
Ken White, Exec. VP
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■SUNYS PETROLEUM INC.
200 Elgin St., Suite 905
Ottawa, Ontario K2P 1L5
Phone: (613) 234-3588
Key: T-M; G, F, D, LPG, L
Subs: Cencan Petroleum Limited
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Kenneth McCrimmon, Pres.
William McInerney, VP
William Dunlop, Controller

■SUPER OIL CO.
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Johnson City, TN 37601
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Robt. Leonard, Exec. VP
Don Haynie, Supr.

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Somerville, NJ 08876
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Marc Baldinger, Pres.
Fred Umar, Gen. Sls. Mgr.

■SWANN OIL
67th St. & Schuylkill River
Philadelphia, PA 19153
Phone: (215) 492-8000
Key: T-M; G, F
Subs: Asphalt & Petroleum Co.
Eastern Oil Transport
Northeast Industrial Oil Corp.
Swann Oil Inc. of Philadelphia
Swann Oil Inc. of North Carolina
Swann Oil of Virginia
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Edmund M. Cameron, VP Asphalt & Petroleum Group
Edward J. Gallagher, VP Opns.
Michael J. Burke, VP Mktg.
J. B. Maher, VP Finance
G. R. Ritter, Controller

■TANNER OIL CO
620 So. Front St.
Ironton, Oh 45638
Phone: (614) 532-9145
Key: M-Rich; Gr
Subs: Rich Oil Corp.
Tanco, Inc.
Rich of Ohio
Rich of West Virginia
Rich Terminal Co.
R. B. Tanner, Pres. & CEO

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12739 Lakewood Blvd.
Downey, CA 90240
Phone: (213) 927-5339
Key: M; Gr, Dr

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New York, NY 10017
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Mick Bombase, VP Supply
Thomas Peters, Commcl. Sls Mgr.
William Nolan, Halstead Quinn Mgr. LPG Mgr. Distrib. Mgr.
Ben Davis, Credit Mgr.
Carl Tarczynski, Mgr. Gasoline Marketing
William Stevens, Mgr. National Accounts

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale, retail
F	Fuel Oil, wholesale, retail
D	Diesel, wholesale, retail
LPG	Liquefied petroleum gas wholesale, retail
L	Lubricants, wholesale, retail
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r	retail only

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Phone: (609) 396-8201
Key: M, D, F
Mrs. Paula Bodine, Pres. & CEO
Richard D. Bodine, VP Sls.

■TAUBER OIL CO.
55 Waugh Dr., Suite 700
Houston, TX 77210
Phone: (713) 869-8700
Key: T, M; Gw, Fw, LPGw
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O. J. Tauber Jr., Pres.
James N. Click, VP
Bill Kile, VP
W. L. Saller, VP LPG
James Marquardt, VP Mktg.
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C. Patrick Bennett, VP Ref.
H. L. Mayes, VP Crude Oil
Joseph Sassin, Controller
David W. Tauber, VP Residual Fuels
J. C. Odell, Exec. VP Petro. Chem.
H. W. Nutter, VP Petro. Chem. Sls.
Gloria A. Redfield, VP Adv. & PR
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■TAYLOR OIL CO.
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110 Oakwood Dr.
Winston-Salem, NC 27103
Phone: (919) 725-9531
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Subs: Etna Service Stations
Triad Terminal Co.
Triad Oil Co.
John A. Taylor, Pres.
James E. Thompson, Exec. VP
Phillip E. Rhyne, Sec. Treas., Controller
Anderson Taylor, Mktg. Mgr.
Jerry W. Stanley, Opns. Mgr.

■TENNECO OIL CO.
Processing & Marketing
P.O. Box 2511
Houston, TX 77001
Phone: (713) 757-2131
Key: I, G, D, F, LPG, L
Sub. of Tenneco Inc.
Subs: Blue Flame Gas Corp.
Direct Oil Corp.
Mitchell Supreme Fuel Co.
Q-S Petroleum Inc.
TLC Oil Co.
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H. H. Daniel, Sr. VP Mktg.
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P.O. Box 76045
6600 Powers Ferry Rd.
Atlanta, GA 30328
Phone: (404) 956-2700
T. L. Davis, Div. Gen. Mgr.
N. K. Bledsoe, Budget & Reporting Mgr.
J. R. White, Industrial Relations Mgr.
J. R. Corbett, Mdse. Mgr.
T. D. Humphrey, Supply & Trans. Mgr.
M. H. Blackmon, Mkt. Dvlpmt. Mgr.
H. O. Boxley, Eastern Zone Mgr.
W. R. Owens, Western Zone Mgr.
W. R. Parker, Employee Rel. Mgr.

Wholesale Mktg. Div.
P.O. Box 76045
6600 Powers Ferry Rd.
Atlanta, GA 30328
Phone: (404) 956-2700
R. B. Sudderth, Div. Gen. Mgr.
R. F. Moist, Jr., Aviation Sls. Mgr.
R. F. Skidmore, Whlsl. Reg. Sls. Mgr.
R. J. Wellem, Div. Credit Mgr.
T. J. Baehr, Supply & Distrib. Mgr.
R. F. Wilson, Budget & Reports Mgr.
R. T. Baney, Whlsl. Reg. Sls. Mgr.

Northeast Reg.
1719 Route 10
Parsippany, NJ 07054
Phone: (201) 267-2170
R. F. Skidmore, Whlsl. Reg. Sls. Mgr.

Districts:
3100 Vera St.
Baltimore, MD 21226
Phone: (301) 355-4300
J. A. Pierson, District Mgr.

678 Doremus Ave.
Newark, NJ 07960
Phone: (201) 344-6825
T. P. Gage, Dist. Mgr.

Southeast Reg.
6600 Powers Ferry Rd.
Atlanta, GA 30328
Phone: (404) 956-2700
R. T. Baney, Whlsl. Reg. Sls. Mgr.

Districts:
5501 Executive Center Dr.
Suite 219
Charlotte, NC 28212
Phone: (704) 537-9925
L. R. Griffin, Dist. Mgr.

3113 Lawton Rd., Suite 100
P.O. Box 20097
Orlando, FL 32814
Phone: (305) 894-4061
J. D. Watson, Dist. Mgr.

Subsidiary Cos.:

Blue Flame Gas Corp.
Gal-Ham Bld.
P.O. Box 376
Bluffton, IN 46714
Phone: (219) 824-3000
R. W. Shafter, Pres.
C. S. McAuliffe, VP
J. Schneider, Treas.

Direct Oil Corp.
P.O. Box 1243
Nashville, TN 37202
Phone: (615) 373-4300
G. R. Walker, Pres.

Mitchell Supreme Fuel Co.
532 Freeman St.
Orange, NJ 07050
Phone: (201) 678-1800
J. S. Bozik, Pres.
K. P. Young, VP
M. W. Stargel, Treas. & Asst. Secty.

TLC Oil Company
P.O. Box 2279
Hartford, CT 06101
Phone: (203) 278-7910
J. E. Beaulieu, Pres.
R. W. Archer, VP

Q-S Petroleum Inc.
P.O. Box 23164
Nashville, TN 37202
Phone: (615) 373-4300
G. R. Walker, Pres.

■TERRIBLE HERBST, INC.
(See Herbst Oil Co.)

■TESORO PETROLEUM CORP.
8700 Tesoro Dr.
San Antonio, TX 78286
Phone: (512) 828-8484
Key: I, G, D, F, LPG, L
Subs: Tesoro Gasoline Marketing Co.
Tesoro Petroleum Distributing Co.
Tesoro Alaska Petroleum Co.
Tesoro Refining, Mktg. & Supply Co.
Robert V. West, Jr., Chmn. & CEO
Z. D. Bonner, Vice Chmn.
Dennis F. Juren, Pres.
J. P. Schmalz, Exec. VP
Dean M. Bloyd, Group VP
Jack Charles, Group VP
Conrad S. Preston, Group VP
James F. Smith, Group VP
Donald N. Bonacci, Sr. VP Admin.
M. Richard Stewart, Sr. VP & Counsel
John J. Tagliarino, Sr. VP Refining
E. W. Cromey, VP Whlsl. Mktg. & Sup.
James R. Hyslop, VP Treasurer
J. John Keenan, VP Corp. Dev.
John M. Morgan, VP Oil Field Sup.
Eugene Nasch, VP Retail Mktg.
William M. Sims, VP Publ. Relations

Tesoro Gasoline Marketing Co.
(Formerly Digas)
9201 W. Olympic Blvd.
Beverly Hills, CA 90212
Phone: (213) 278-2160
Key: M, Gr
Arthur Spitzer, Chmn.
Eugene Nasch, Pres. & CEO
Earl Redmon, VP & Sls. Mgr.
Lyle Bittner, Opns. Mgr.

Tesoro Alaska Petroleum Co.
P.O. Box 6272
3380 C Street
Anchorage, Alaska
Richard J. Downey, Sr. VP

P.O. Box 3691
Kenai, Alaska
Glen R. Jackson, VP

Tesoro Gasoline Marketing Co.
9201 W. Olympic Blvd.
Beverly Hills, CA 90212
Eugene Nasch, Pres.
Earl Redmon, VP

Tesoro Petroleum Distributing Co.
P.O. Box 23278
Harahan, Louisiana 70183
John H. Morgan, Exec. VP

Tesoro Refining, Marketing & Supply Co.
8700 Tesoro Drive
San Antonio, TX 78286
John J. Tagliarino, Sr. VP

9100 Wilshire Blvd., Suite 325
Beverly Hills, CA 90212
E. W. Cromey, Sr. VP
Steve Janzen, VP

■TEXACO INC.
2000 Westchester Ave.
White Plains, NY 10650
Phone: (914) 253-4000
Key: I, G, F, LPG, L
Subs: Texaco Canada Inc.

Texaco U.S.A.
1111 Rusk Ave.
Houston, TX 77002
Phone: (713) 650-4000
J. W. Kinnear, Pres.
Robert R. McCall, Exec. VP

Texaco, Canada
90 Wynford Drive
Don Mills, Ontario M3C 1K5
Phone: (416) 445-7800
Key: I, G, F, LPG, L, D
Sub. of Texaco Inc.
J. L. Dunlap, Pres. & CEO
J. L. Morrison, Exec. VP
N. E. Taylor, VP-Mktg.
J. M. Chantler, Gen. Mgr. Mfg.
H. M. James, Coord. Mktg.—Exec. Off.
C. A. Monk, Mgr. Credit Card Mktg.
J. J. Brill, Mgr. Distrib. & Devel.
T. D. Lusted, Coord. Petrochem.
D. H. Pugsley, Coord. Eng. Svcs.
E. R. Glew, Coord. Aviation
H. T. Walton, Mgr. Admin. & Systems
T. J. Puccini, Mgr. Opns. Center
D. C. McLachlan, Mgr. Sls. Promo.
S. G. Ecclestone, Coord. Mktg. Programs & Training
G. M. Hogan, Mgr. Mktg. Planning

■TEXAS CITY REFINING, INC.
P.O. Box 1271
Texas City, Texas 77590
Phone: (409) 945-4451
Sub: TCR, Inc.
Key: I, M, G, F, D, W
M. W. Houser, Pres.
A. T. Rowe, Exec. VP
M. C. Chambers, VP Sls. and Crude Supply
S. C. Boyd, Sls. Mgr.
J. F. King, Sls. Mgr.—Texas
C. C. Hottmann, Mgr. Terminal Sls.

Southwest Area—Texas
1010 Lamar, Suite 777
Houston, Texas 77002
Phone: (713) 650-1200
J. F. King, Sls. Mgr.—Texas

Southeast Area—North and South Carolina
P.O. Box 308
Garner, North Carolina
Phone: (919) 772-5430
A. L. Walton, District Mgr.
K. L. Goodhouse, Mktg. Representative
T. E. Ray, Mktg. Representative

South Central Area—Tennessee
P.O. Box 875
Smyrna, Tennessee 37167
Phone: (615) 459-0083
J. K. Wilson, District Mgr.

■TCR, INC.
(Sub of Texas City Refining, Inc.)
(Formerly Rebel Oil Co.)
P.O. Box 13310
Eight Mile, Alabama 36613
Phone: (205) 457-6827
B. M. Ponder, Gen. Mgr.

■TEXAS ARMADA REFINING CO.
(Formerly Petroleum Industries)
12625 Calloway Cemetery Rd.
Euless, TX 76039
Phone: (817) 267-2840
Key: T-R-M; Gw, Dw, Fw, LPGw
Sub. of Armada International Corp.
Ken W. Griffin, CEO
Cud Baird, Pres.
Anthony Wright, Exec. VP

■TEXAS STAR SERVICE
P.O. Box 151
Corpus Christi, TX 78403
Phone: (512) 882-3311
Key: T-M; G-Texaco, D, F, L
Sub. of Texas Start Investments
G. T. Brooks, Pres. & CEO
Bill Arrington, Mgr. Fuels Div.
Speedy Hill, Opns. Mgr.

■THORNHILL OIL COMPANY
P.O. Box 5034
Fort Wayne, IN 46895
Phone: (219) 432-9407
Key: M; G, D, F, L
Sub: Smith Petroleum Inc.
Robert J. Thornhill, Pres. & CEO, VP Mktg., Adv. Mgr.
James Couture, Gen. Sls. Mgr.
Lonnie Wilson, Gen. Mgr.—Smith Petroleum Inc.

■THORNTON OIL CORP.
10200 Linn Stn. Rd.
Louisville, KY 40223
Phone: (502) 425-8022
Key: M; Gr, Dr
James H. Thornton, Chmn.
Paul J. Perconti, Pres.
Lawrence W. Hammett, VP Treas.
Brenda M. Stackhouse, VP Purch.
Robert A. Iezzi, VP Opns.
Richard A. Snider, VP Mktg.

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Thriftyman, Inc.
3200 Maple Ave., 5th Fl.
Dallas, TX 75201
Phone: (214) 698-1161
John B. Meaders, Pres.
David H. Hillburn, VP

■THRIFTY OIL. CO.
10000 Lakewood Blvd.
Downey, CA 90240
Phone: (213) 923-9876
Key: R-M; G, D
Sub: Golden West Ref. Co.
Ted Orden, Pres. & CEO
Robert J. Drew, Exec. VP Opns.
Jack Elgin, Sr. VP Finance
Tom Flesh, VP & Gen. Counsel
Taz Latham, VP Finance
Van Tarver, VP Convenience Stores

GOLDEN WEST REFINING COMPANY
13539 E. Foster Road
Santa Fe Springs, CA 90670
Phone: (213) 921-3581
Key: Refiner; G, D
Ted Orden, Pres. & CEO
Roger Kemple, Sr. VP Opns. & Mktg.
Jack Elgin, Sr. VP Finance
Barry Berkett, VP & Gen. Counsel
Jim Flockhart, VP Refinery Opns.
Guyette Honeyman, VP Prod. Mktg.
Bob Redd, VP Crude Supply

■TIGER PETROLEUM
820 S. Fritz St.
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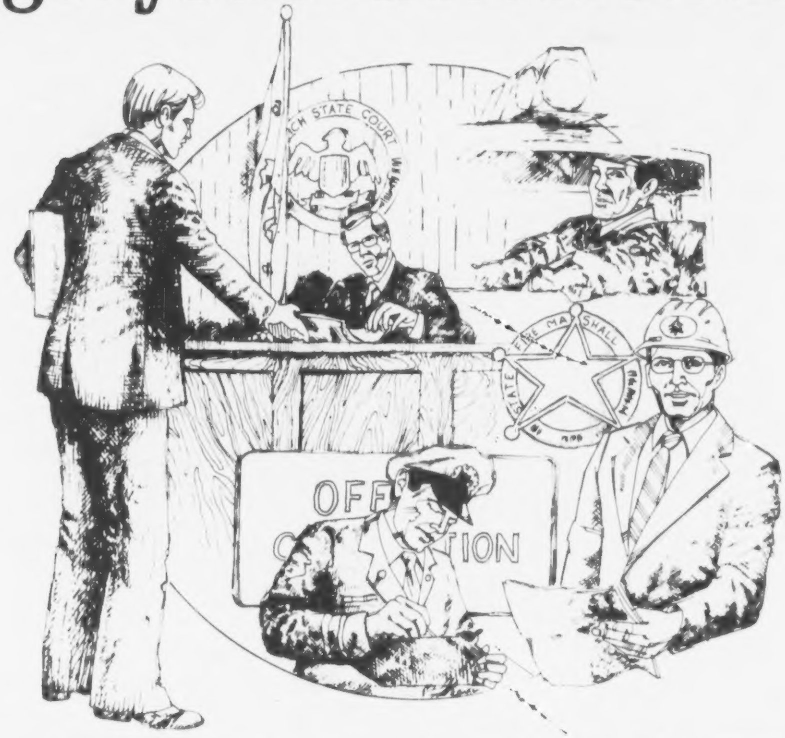

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It's a simple, step-by-step program that determines if a leak exists, where it is and how best to repair it. There's also a method for determining the probable condition of non-leaking tanks. It's a sound, complete program for resolving tank leaks—and it's another advantage that Union Oil jobbers have.

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R. D. Abendroth, Pres.
Wayne Miller, Retail Sls. Mgr.
Robt. D. Abendroth, Opns. Mgr.
A. A. Schneider, Real Estate Mgr.
Chuck Combe, Wholesale Sls. Mgr.

Los Angeles Office
5150 Wilshire Blvd.
Los Angeles, CA 90036
Phone: (213) 938-7151
C. Edward Miller, Chmn.
H. Roger Holliday, Mgr., Trans. Sup.

No. Calif. Div.
488 Wright Ave.
Richmond, CA 94802
Henry J. Bailey, Term. Mgr.

Oregon Div.
12005 N. Burgard
Portland, OR
Neil Wallis, Term. Mgr.

■**TIMES OIL CORP.**
P.O. Box 795
Lincolnton, NC 28092
Phone: (704) 735-3092
Key: M; G, F, D, L
Subs: Eaton Oil Co.
Hugh Paschal Oil Co.
Times Oil Co. of Reidsville
Dan M. Boyd, III, Pres. & CEO
William G. Boyd, Exec. VP
Bill Massey, Mktg. VP & Gen. Sls. Mgr.

■**T. J. TERMINALS CORP.**
P.O. Box 2775
Topeka, KS 66601
Phone: (913) 233-0881
Key: M; O-Avgas
Dale Miller, Exec. VP
Bill Oliver, VP Av. Sls.

■**TOMMY OIL CO.**
P.O. Box 1858
Topeka, KS 66601
Phone: (913) 232-9820
Key: M; Gr, Dr
T. G. Hudson, Pres.
Franz F. Stangl, Exec. VP
Dale L. Miller, VP

■**TOOLEY OIL COMPANY**
50 Fullerton Ct., Suite 203
Sacramento, CA 95825
Phone: (916) 929-9351
Key: M; Gr, Dr
Michael C. Tooley, Pres. & CEO

■**TOP VALU GASMARTS**
Div. of Loeb Inc.
400 Industrial Ave.
Ottawa, Ont. K1G 3K8 Canada
Phone: (613) 737-1350
Key: M; G, D, F, LPG, L
Provigo Inc.
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William Kipp, Exec. VP
David Guilfoyle, VP Mktg.
Richard Boyer Peter Murray, Mktg. Mgrs.

■**TORCO OIL CO.**
624 S. Michigan Ave.
Chicago, IL 60605
Phone: (312) 341-1600

■**TOSCO CORP.**
2401 Colorado Ave.
P.O. Box 2401
Santa Monica, CA 90406-2401
Phone: (213) 207-7000
Key: R-M; Gw, Fw, Dw, LPGw
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Harry L. Langdon, Exec. VP Supply & Mktg. Div.
William A. Floyd, VP Mktg. & Supply
Jack G. Drosdick, VP Ref.
Herbert B. Gregory, Gen. Mgr. Whsl. Mktg.
George E. Ogden, Gen. Mgr. Prod. Supply and Distrib.
Peter Sutton, Gen. Mgr. Crude Oil Supply

Pacific N.W. Region
9900 S.W. Wilshire—Suite 112
Portland, OR 97225
R. W. Bigger, Region Mgr.

Pacific S.W. Region Office
15910 Ventura Blvd.—Suite 923
Encino, CA 91436
L. V. Avakian, Region Mgr.

Southwest Region Office
400 East North Belt Dr.—Suite 205
Houston, TX 77060
D. J. Layton, Region Mgr.

■**TOTAL PETROLEUM, INC.**
999 18th Street, Suite 2201
Denver, CO 80202
Phone: (303) 291-2000
Key: I; G-Total, APCO, D, F-Total, APCO, LPGw, L
Subsidiary of Total Petroleum (N.A.) Ltd.
Philippe Dunoyer, Pres. & CEO
K. R. Buckler, Exec. VP Petro. Prod.
J. L. Kramer, VP Whisl., Mktg. & Prod. Supply

Retail Division
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L. Resseguie, Eastern Region Mgr.
D. Strong, Central Region Mgr.

Distributor & Industrial Division
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H. T. Fisher, Branded Distrib. Mgr.
J. L. Steere, Unbranded & Industrial Sls. Mgr.

TBA Division
S. L. Shofner, Mgr.

APCO Division
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D. G. Wright, Gen. Mgr.
M. C. Peterson, Northern Region Mgr.

■**TOWN PUMP AND AFFILIATES**
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Butte, MT 59701
Phone: (406) 723-5410
Key: T-M; G, D, LPG, Lr
Thomas F. Kenneally, Pres.
J. M. Kenneally, VP Whisl. & Mktg.
Ron R. Roos, Gen. Mgr.
Daniel J. Kenneally, Opns. Mgr.

■**TRANSIT OIL CO.**
1002 S. Brook St.
Louisville, KY 40203
Phone: (502) 584-0101
Key: M; G, D, F
W. H. Millard, Jr., Chmn.
Robert Don Asbury, Pres.
Keith Miller, Gen. Sls. Mgr.

■**TRAVELERS PETROLEUM**
P.O. Box 1426
2314 N. Main Street, Suite 224
Anderson, SC 29622
Phone: (803) 225-4676
Key: M; Gr-Self Way Texaco, Dr, Lr
Sub: Self Way Food Stores
Irvin L. Cauthen, Chmn.
Joe F. Brandt, Pres.
Robt. A. League, Jr., VP
Hamish Turner, Jr., VP

■**TRENTON OIL CO.**
1463 Lamberton Rd.
Trenton, NJ 08611
Phone: (609) 695-1220
Key: M; Fw, Dw
Cyril P. Forbes, Pres. & CEO
John R. Knapsack, Exec. VP

■**TRESLER OIL CO.**
4050 River Rd.
Cincinnati, OH 45204
Phone: (513) 347-1234
Key: M; Gw, Dw, Fw, Lw
Sub. of Ashland Oil, Inc.
James C. Krumme, Pres.
Donald P. Krumme, Sr. VP
Tony Elsass, Gen. Sls. Mgr.
Lynn Ernst, Asst. VP, Opns.

■**TRITON INC.**
P.O. Box 47631
Atlanta, GA 30362
Phone: (404) 457-7271
Key: M; G, D
T. V. Patton, Pres. & CEO
Dennis Gagnon, Exec. VP Opns.
Donald R. Gilliam, Exec. VP Fin.
J. L. Conine, Sr. VP Real Estate

■**TRUAX CORP.**
1760 S.W. 3rd
Corvallis, OR 97330
Phone: (503) 758-1500
Key: T-M; G-Shell, D, F, L
Sub: Truax Oil Inc.
John Truax, Pres.
Jack Todd, Exec. VP
Bill Cooksen, Sls. Mgr.

■**TRYON OIL CO.**
P.O. Box M
Johnstown, NY 13095
Phone: (518) 762-4581
Key: M; G, F, D, Lr
Sub. of J. W. Buhrmaster Co.
James Buhrmaster, Pres.
Herbert Wilde, Mgr.

■**TURBO RESOURCES LIMITED**
400, 609-14 Street N.W.
Calgary, Alberta, Canada T2N 2A1
Phone: (403) 263-6202

■**ULTRAMAR PETROLEUM, INC.**
135 Chestnut Ridge Road
Montvale, NJ 07645
Phone: (201) 573-0300
Key: M; G, F, D
Sub. of Ultramar American, Ltd.
Subs: Ultramar PCL
W. L. Mannion, Pres.
J. T. Tower Jr., Sr. VP
R. D. Zelek, VP Mktg.
P. J. Colapinto, VP Supply
J. C. Foster, VP Opns.
D. F. Walton, VP Fin.
W. L. Deloria, Gen. Mgr. Sls.
G. Graham, Gen. Mgr. Motor Fuels

■**UNION OIL CO. OF CALIFORNIA**
P.O. Box 7600
Los Angeles, CA 90017
Phone: (213) 977-7600
Key: I; G, D, F, LPG, L
Sub. of Unocal Corp.
Fred Hartley, Pres. & CEO
W. S. McConner, Sr. VP & Pres. Union 76 Div.
C. R. Warnock, VP Mktg. Western Reg.
T. W. Matthews, VP Mktg. Eastern Reg.
T. R. Seden, Adv. Mgr.
Karen Sikkema, Dir. Corp. Communications

Union 76 Division
Union Oil Co. of Calif.
1650 East Golf Rd.
Schaumburg, IL 60196
Phone: (312) 885-7676
Key: I; G, F, LPG, L
W. S. McConnor, Pres. (Located in Los Angeles)
R. C. Beach, VP Crude Supply Dept. (Los Angeles)
W. F. Krick, Reg. Mgr. Gov't. Relations
R. N. Creek, VP Admin.
G. H. O'Leary, Gen. Mgr. Credit Card Opns. (Located in San Francisco)
W. E. Branstrom, Dir. Planning (Located in Los Angeles)
T. R. Seden, Mgr. Adv. (Los Angeles)
J. W. Groesch, Mgr. Mktg. Information
R. E. Robbins, VP Nat'l. Mktg.
C. C. Petray, Gen. Mgr. Truck Industry & Interstate Sls.
J. P. Hill, Jr., Gen. Mgr. Nat. Gas Liquids (Houston)
A. A. Brisson, Mgr. Commc'l Credit

Eastern Region
1650 East Golf Rd.
Schaumburg, IL 60196
Phone: (312) 885-7676
R. F. Nootbaar, Jr., Sr. VP Refg. & Mktg.
T. W. Matthews, VP Mktg.
R. R. Runge, VP Refg. & Trans.
J. A. Mihalek, Gen. Mgr. Mktg.
P. D. Fisler, Gen. Mgr. Mktg. Distrib.
D. C. Eichten, Reg'l. Mgr. Interstate Auto Truck Stops
M. S. Podgurski, Mgr. Mktg. Planning
R. H. Smith, Mgr. Mktg. Engr. & Constr.
H. A. Kunberger, Mgr. Mktg. Planning & Admin.
A. D. Littlejohn, Mgr. Jobber & Distributor Dvlpmt.
W. H. Kees, Mgr. Mktg. Trans.
John C. Griffin, Mgr. Admin. Svcs.
W. J. Myers, Mgr. Mktg. Equip.

Atlanta (GA 30302)
13 Corporate Sq., N.E.
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Chicago
2060 Stonington Ave.
Hoffman Estates, IL 60172
F. L. Walker, Div. Sls. Mgr.

Columbus (OH 43229)
2700 E. Dublin
Granville Rd., Suite 400
W. A. Sawyer, Div. Sls. Mgr.

Western Region
P.O. Box 7600
Los Angeles, CA 90054
Phone: (213) 977-7600
D. L. Hanley, Sr. VP Refg. & Mktg.
C. R. Warnock, VP Mktg.
E. P. Barnett, VP Refg. & Supply
W. A. Fyock, Gen. Mgr. Mktg.
J. H. Vanderveen, Mgr. Whisl. Sls. & Supply
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D. F. Charles, Mgr. Purchasing
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Northern-Calif. Div.
One California St.
San Francisco, CA 94111
R. D. Burnham, Div. Sls. Mgr.

Los Angeles Div.
3701 Wilshire Blvd.
Los Angeles, CA 90010
J. M. Peck, Div. Sls. Mgr.

Northwest Div.
2901 Western Ave.
Seattle, WA 98121
D. W. Lamb, Div. Sls. Mgr.

Continental Div.
123 Camino de la Reina
San Diego, CA 92108
J. C. Robertson, Div. Sls. Mgr.

Hawaii Dist.
841 Bishop St., Suite 2204
Honolulu, HI 96813
W. M. Schreve, Dist. Sls. Mgr.

Union Chemicals Div.
Union Oil Co. of Calif.
461 So. Boylston St.
Los Angeles, CA 90017
Phone: (213) 486-7600
Key: M; Petrochemicals
T. C. Henderson, Pres.
K. L. Openshaw, Sr. VP Carbon
L. S. Pierson, Sr. VP Nitrogen
O. C. Mauthe, Adv. Mgr.

Petrochemical Group
1345 N. Meacham Rd.
Schaumburg, IL 60196
Phone: (312) 885-5450
N. E. Lynam, Sr. VP
A. F. Schroeder, Mktg. VP

Regions

Northeastern Reg.
67 Walnut Ave.
Clark, NJ 07066
J. C. Maher, Gen. Mgr.

Midwestern Reg.
1650 E. Golf Rd.
Schaumburg, IL 60196
F. S. Bartholomew, Gen. Mgr.

Southeastern Reg.
17 Executive Park Dr., N.E.
Atlanta, GA 30329
G. F. Davies, Gen. Mgr.

Southwestern Reg.
1100 Milam Bldg., Suite 2675
Houston, TX 77002
C. E. Cook, Gen. Mgr.

Western Reg.
14445 Alondra Blvd.
La Mirada, CA 90638
D. R. Love, VP & Gen. Mgr.

International Div.
1345 Ave. of Americas
New York, NY 10105
D. J. Henry, Gen. Mgr.

■**UNITED OIL INDUSTRIES**
P.O. Box 1867
Athens, GA 30603
Phone: (404) 543-8292
Key: M; Gr, Dr,
James H. Moore, Pres.

■**UNITED MARKETING CO.**
125 Chatauqua Ave.
Lakewood, NY 14750
Phone: (716) 763-8566
Key: M; Gr, Dr, Lr
Subs: Kwik Fill Mini Market
United Marketing
Richard W. Shaw, Div. Mgr., N.Y.
Richard Blythe, Div. Mgr., Pa.-Ohio

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale, retail
F	Fuel Oil, wholesale, retail
D	Diesel, wholesale, retail
LPG	Liquefied petroleum gas wholesale, retail
L	Lubricants, wholesale, retail
w	wholesale only
r	retail only

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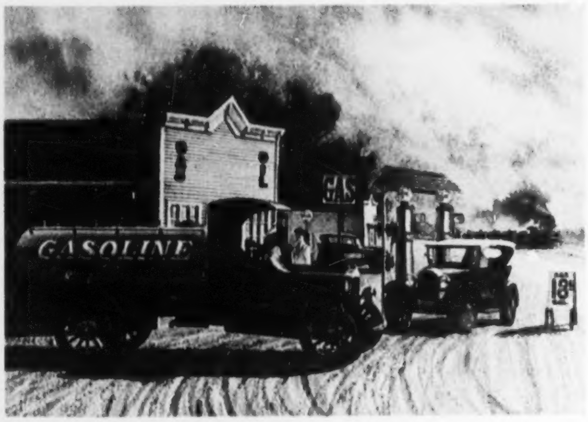

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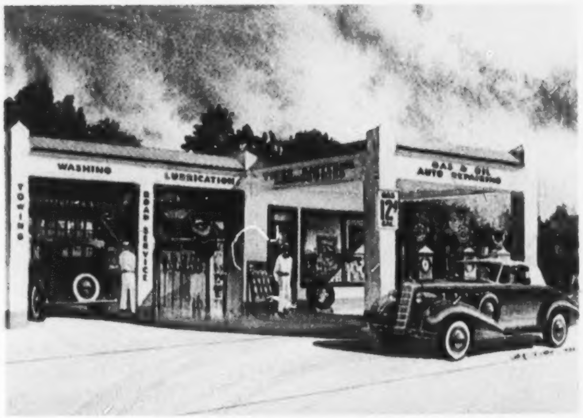
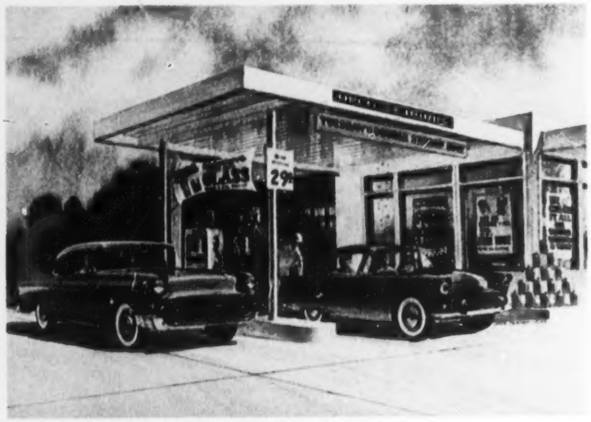
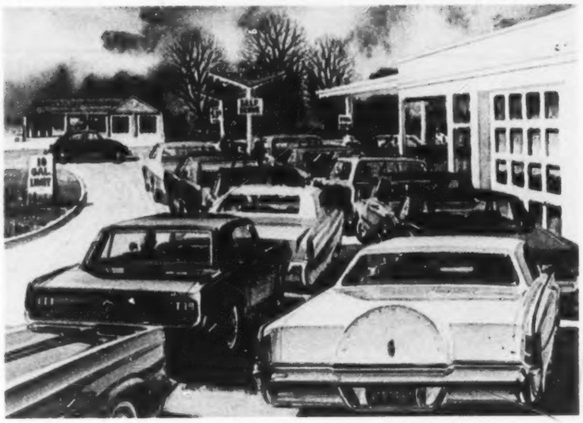


Mechanic on Duty



Double Stamps on Tuesday



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To celebrate our 75th anniversary, National Petroleum News commissioned artist Jack Schmitt N.W.S. to create 4 special paintings of importance to the Petroleum Industry. A lot of history has been reported on the pages of NPN since 1909 and the artist has illustrated 4 eventful eras in his authentic and carefully detailed paintings.

The paintings have been made available in a very small limited edition of only 250 signed and numbered collector prints and 20 signed artist proofs. These colorful fine art prints are of the finest quality, on 100% rag paper, and are a faithful reproduction of the original paintings. A certificate of authenticity guarantees that this is a one time special limited edition of 250 and will not be available ever again when it has sold out. Print image measures 15½ x 22. Prints may be ordered individually for \$50 each, or at a special anniversary price for the set of 4 for \$180, plus \$4 each order for shipping.

FB84

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- ☐ Double Stamps on Tuesday
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Wm. S. Sudhaus, Pres. & COO
P. R. Hunter, Exec. VP
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Harold D. Shapiro, Exec. VP
Joseph Shapiro, Exec. VP

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Santa Monica, CA 90404
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Wasyl Kurinij
Edward T. Smolarski

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Phone: (208) 522-1210
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Gary Huskinson, VP

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Troy, PA 16947
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Stephen J. Skinner, VP
Nicholas Delauro, Sls. Mgr.

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Vicksburg, MS 39180
Phone: (601) 636-8520
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B. A. Holman, Exec. VP

■**VULCAN ASPHALT REFINING CO.**
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Cordova, AL 35550
Phone: (205) 483-9262
Key: M-R; F, D
Sub. of United Ref. Co.
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Melvin R. Kacharos, VP-Finan
Irvin W. Watkins, Jr., VP, Sls.
Gary Robbins, Supt.

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(Formerly WACO Oil & Refining Co.)
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Covington, KY 41011
Phone: (606) 581-9226
Key: M; Gr, Fr
Don Conrad, Pres.
Giles Conrad, Exec. VP
Larry Rolfsen, VP
Bill Hollis, VP, Food Marts

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale, retail
F	Fuel Oil, wholesale, retail
D	Diesel, wholesale, retail
LPG	Liquefied petroleum gas wholesale, retail
L	Lubricants, wholesale, retail
w	wholesale only
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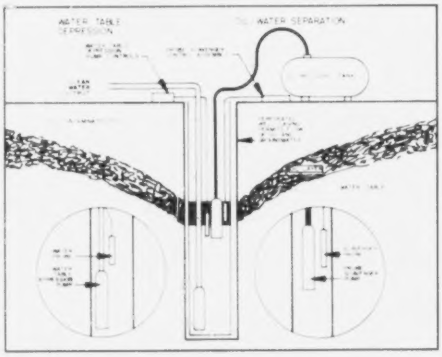

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Ralph Y. Metcalf, Jr., VP
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Thomas L. Corr, VP-Mktg.
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Laura Hindmarsh, Trading Accountant
Kathryn M. Kenney, Asst. in Accounting-Trade
Jeanne D. Comeau, Systems Mgr.
Faith L. Raifman, Rating Asst.
Stephen R. Somers, Corporate Accountant
Richard C. McHale, Telecommunications and M.I.S. Mgr.
Scott M. Van de Mark, Trading Analyst
Rebecca L. Brockett, Communications
Cheryl D. Campbell, Communications
Stephanie A. Barnes, Communications

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B. A. Snider, VP, Mktg., NJ & PA
M. Kutsch, VP Regs. & Finan.
James Day, Sup. & Dist.
Dennis Scullin, Sup. & Dist.

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N. Grosvenordale, CT
F. K. LaForge, Pres.
R. Hernberge, Mgr. Fuel Oil Sls.

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Drake Oil Ltd.
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Auburn, MA
F. LaForge, Pres.

New Jersey-Pennsylvania Div.
Puritan Oil Co., Inc.
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Bellmawr, NJ
B. A. Snider, NJ Pres.
T. Player, PA Pres.

New York Div.
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C. F. Hutchinson, Pres.
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Warren Oil Co.
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P.O. Box 56
Lacey's Spring, AL 35754
Phone: (205) 881-3621
Key: M, G, D
Sub: Wavaho Land Corp
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Walter V. Hough, Jr., Sec. Treas.

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P.O. Box 312
Webster, NY 14580-312
Phone: (716) 872-2121
Key: M, G, F, D, L
Sub: Gateway Oil Co.
Webco Southern Oil Co.
Herbert Ingersol, Pres. & CEO
Gerald Pinkley, Exec. & Mktg. VP, Sls. & Credit Mgr.

■WEBB OIL CO.
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Phone: (517) 790-9344
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Wm. Webb, Jr., Pres.

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Camden, NJ 08105
Phone: (609) 964-1300
Key: T-M; G-Exxon, D, F, L
Subs: Federal Oil Co.
Cape May County Oil Co.
Christian M. Weber, Sr., Pres. & CEO
Christian M. Weber, Jr., Exec. VP
Andrew H. Aman, Gen. Sls. Mgr.
Edmund Renner, Opns. Mgr.
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Springfield, MO 65804
Phone: (417) 883-2666
Key: M-Phillips; G, D, L
Subs: Tri Lakes Oil & Gas
Sac Osage Oil Co.
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James H. Dowell, Exec. VP
Bob Boyar, Mktg. VP
Tim Webster, Advtg. Mgr.

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Waterbury, CT 06722
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Robt. W. Wesson, Pres. & CEO

■WEST PENN OIL CO.
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Warren, PA 16365
Phone: (814) 723-9000
Key: L
Larry A. Lang, Exec. VP & CEO
Janet Lang, Pres.

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Abilene, TX 79604
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J. D. Naler, Pres.
J. R. Thacker, Exec. VP
R. T. Dansby, VP Fin.
R. N. Hasten, VP Retail Mktg.

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Gary Wartick, Kansas City, KS

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Minneapolis, MN 55440
Phone: (612) 941-9090
Key: T-M; G, D, F, LPG
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R. W. Carthaus, Sr. VP
Leland Granlund, VP Finance
R. S. Neville, VP Mktg.

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Brooklyn, NY 11231
Phone: (212) 852-7000
Key: T-M; Gr, Dr, Fr
Subs: Circle Combustion Corp
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Anthony C. Silecchia, Gen. Mgr.
C. Edwards Ross, Treas.
Neil Bianco, Asst. Gen. Mgr.
Joseph A. Vassallo, VP Mktg.
Matthew J. Ryan, Supply & Distrib. Mgr.

■WHALE OIL CORP. OF NEW JERSEY
10-14th St.
N. Brunswick, NJ 08902
Key: T-M; Gr, Dr, Fr
Subs: Mid-State Oil
Nassau Oil
Petro Roseland
White Meadow Petroleum
Pete. J. Carini, Pres. & CEO
Anthony C. Silecchia, Gen. Mgr.
C. Edwards Ross, Treas.
Neil Bianco, Asst. Gen. Mgr.
Joseph A. Vassallo, VP Mktg.
Matthew J. Ryan, Supply Dist. Mgr.

■WHALE OIL CORP. OF NEW ENGLAND
324 Marginal Street
Chelsea, MA 02150
Phone: (617) 884-9350
Key: T, M; Gr, Fr, Dr
Subs: Busfield Oil
Callahan Oil
Colonial Oil
Hicks Cromwell Oil
Litchfield-McDonald Oil
Mercury Oil
Colony Oil
Pickering Oil
C. Y. Woodbury
Peter J. Carini, Pres. & CEO
Anthony C. Silecchia, Gen. Mgr.
C. Edwards Ross, Treas.
Neil Bianco, Asst. Gen. Mgr.
Joseph A. Vassallo, VP Mktg.
Matthew J. Ryan, Supply Distrib. Mgr.

■WICKLAND OIL CO.
1765 Challenge Way
Sacramento, CA 95815
Phone: (916) 921-1100
Key: M; G, D
J. Al Wickland, Jr., CEO
John A. Wickland, III, Pres.
Roy L. Wickland, Exec. VP
Mike Levine, VP Finance
Dan Hall, VP Legal
Craig La Clair, Asst. to Pres.
Bill Silvia, Dir. Human Resources

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale, retail
F	Fuel Oil, wholesale, retail
D	Diesel, wholesale, retail
LPG	Liquefied petroleum gas wholesale, retail
L	Lubricants, wholesale, retail
w	wholesale only
r	retail only

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Jim Williams, VP Trans. Mktg.
Jerry Hifner, Trans. Mgr.

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Mike Walton, Mgr., Constr. Maint.
Bill Gilson, Mgr. Real Estate

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Spartanburg, SC 29304
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Key: M-Amoco: G, F, D, Lr
Subs: Willard Tire Store
Meador Oil Co., Inc.
Ben S. Willard, Pres.
William G. Willard, III, VP
Mary Hutchins, Credit Mgr.
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Winston-Salem, NC 27109
Phone: (919) 767-6280
Key: M: Gr, Dw, Fw
A. Tab Williams, Jr., Pres. & CEO
Arthur Tab Williams, III, VP
Stephen T. Williams, Asst. VP
H. Frank Steelman, Sec.-Treas.

■**J. H. WILLIAMS OIL CO.**
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Tampa, FL 33601
Phone: (813) 228-7776
Key: M: G-Union 76-D, F-Union 76, L
Sub: 76 Mini Marts, Inc.
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J. Hulon Williams, III, VP Treas.
E. L. Singletary, Sls. Mgr.
Dorothy F. Conerly, Sec.

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P.O. Box 185
Wallingford, PA 19086
Phone: (215) 566-7600
Key: T-M: F, D
Sub: Jones Fuel & Heating Co.
Marvel Wilson, Jr., Pres.
Layton G. Wilson, VP, Sec.
F. H. Kurr, Asst. VP, Treas.

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New York, NY 10022
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W. J. Ashe, Pres. & COO
J. L. Kennedy, Exec. VP Petroleum Gp.
R. D. Saunders, PV Petroleum Gp.

Kendall Amalie Div.
Bradford, PA 16701
Phone: (814) 368-6111
H. P. Pruch, VP & Gen. Mgr.
V. E. Neatrour, Jr. VP Mktg.
W. Hart, VP Mfg. & Res.

Kendall Ref. Co., Div.
77 N. Kendall Ave.
Bradford, PA 16701
Phone: (814) 368-6111
L. M. Woods, Branded Sls. Mgr.
John P. Freaney, Adv. Dir.

Amalie Ref. Co., Div.
77 N. Kendall Ave.
Bradford, PA 16701
Phone: (814) 368-6111
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Los Angeles, CA 90067
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Southwest Petro-Chem Div.
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Olathe, KS 66061
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Fred Werbe, VP, Mktg.
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Compton, CA 90221
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Olathe, KS 66061
Robert Duroche, Plt. Mgr.

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220 W. Waterman
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P.O. Box 1148
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409 Grain Exchange Bld.
Omaha, NE 68102
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New Haven, CT 06510
Phone: (203) 787-2175
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D. F. Blanchard, Pres.
W. P. Macauley, VP-Sec.
C. T. Krug, VP
B. F. Perkins, VP
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Houston, TX 77092
Phone: (713) 688-9835
Key: M: LPGw
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Matt Deluloo, Exec. VP
John Collins, Sr. VP
A. J. Fontana, VP Supply
Dave Hoobler, VP Sls.

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Hampton, VA 23669
Phone: (804) 723-3371
Key: M: G-Citgo, D, F, L
Sub: Easy Go C-Stores
Geo. M. LeCuyer, Pres. & CEO
E. Wayne Jackson, Jr., Exec. VP
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Rick Cawthon, Opns. Mgr. Easy Go C-Stores
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Phone: (215) 447-9087
Key: M: G-Young, D
Sub: Grub Mart
Millard V. Young, Jr., Pres.

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Shawnee, KS 66203
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Key: T-M: Gr, Dr
Zarda Dairy Convenience Stores
Bernard A. Zarda, Pres.

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1222 Holton
Muskegon, MI 49443
Phone: (616) 744-1631
Key: M: G-Zephyr, D, F-Zephyr, L
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R. H. Dillard, Exec. VP
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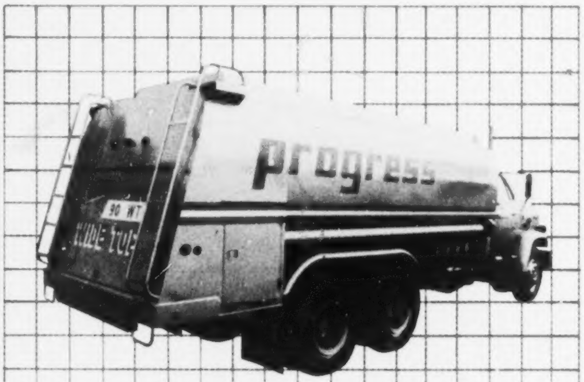

Model 90WT

progress
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for the Petroleum Industries

These Centrifugal Pumps are designed primarily for pumping petroleum products, related derivatives, petro-chemicals and solvents. In no way are they adaptations of pumps originally built for handling water or other non-petroleum liquids. Thus these models incorporate design features of paramount value for liquid hydrocarbon service.

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With the Roto-Prime pump an integral variable-capacity vane pump automatically evacuates air and vapor. This principle is simple, dependable and time-proven around the globe.

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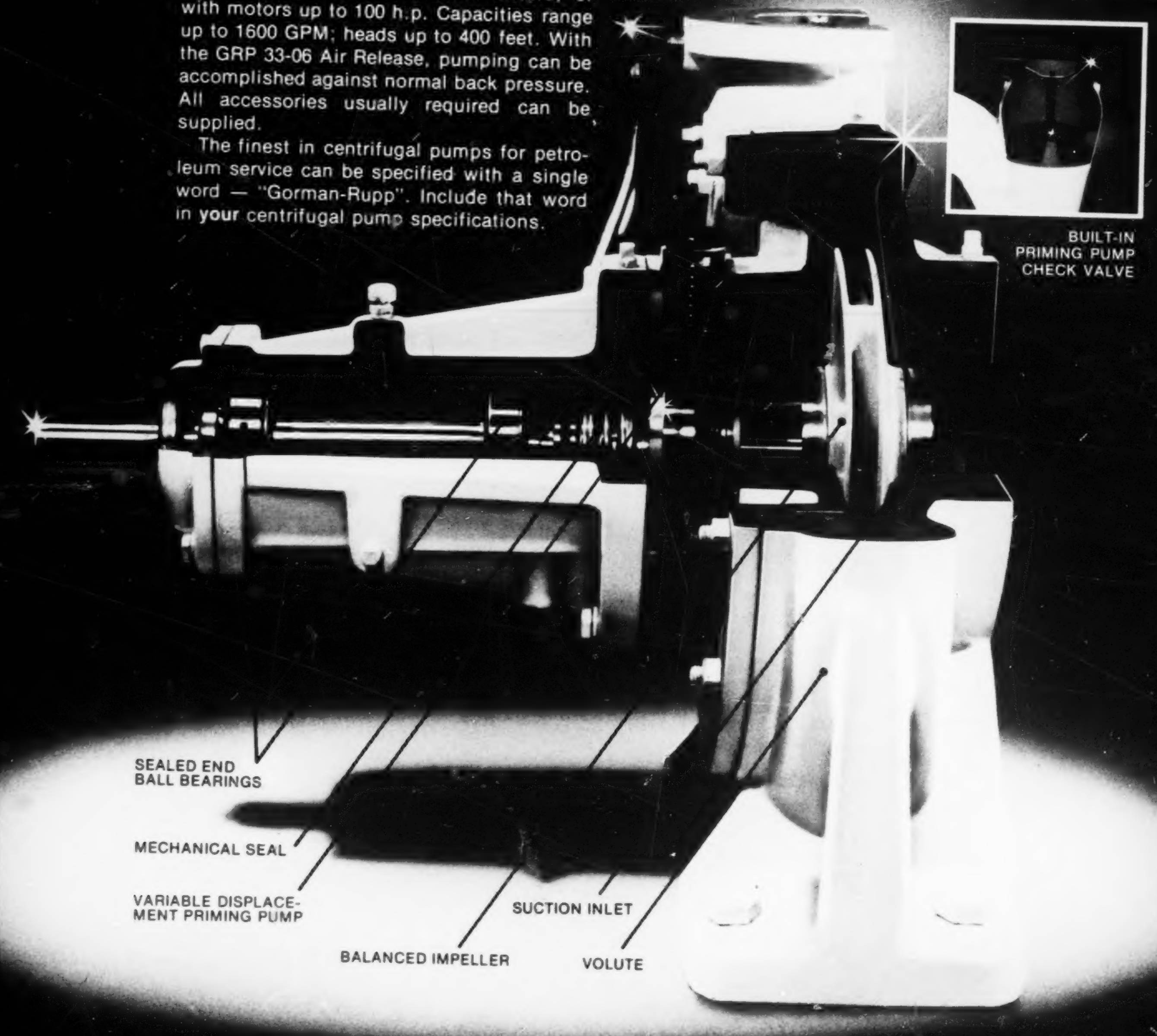

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GR-P-178

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If you still believe in me, save me.

For nearly a hundred years, the Statue of Liberty has been America's most powerful symbol of freedom and hope. Today the corrosive action of almost a century of weather and salt air has eaten away at the iron framework; etched holes in the copper exterior.

On Ellis Island, where the ancestors of nearly half of all Americans first stepped onto American soil, the Immigration Center is now a hollow ruin.

Inspiring plans have been developed to restore the Statue and to create on Ellis Island a permanent museum celebrating the ethnic diversity of this country of immigrants. But unless restoration is begun now, these two landmarks in our nation's heritage could be closed at the very time America is celebrating their hundredth anniversaries. The 230 million dollars needed to carry out the work is needed now.

All of the money must come from private donations; the federal government is not raising the funds. This is consistent with the Statue's origins. The French people paid for its creation themselves. And America's businesses spearheaded the public contributions that were needed for its construction and for the pedestal.

The torch of liberty is everyone's to cherish. Could we hold up our heads as Americans if we allowed the time to come when she can no longer hold up hers?

Opportunities for Your Company.

OFFICIAL SPONSOR LIBERTY

You are invited to learn more about the advantages of corporate sponsorship during the nationwide promotions surrounding the restoration project. Write on your letterhead to: The Statue of Liberty-Ellis Island Foundation, Inc., 101 Park Ave, N.Y., N.Y. 10178.

KEEP THE TORCH LIT

Save these monuments. Send your personal tax deductible donation to: P.O. Box 1986, New York, N.Y. 10018 **The Statue of Liberty-Ellis Island Foundation, Inc.**

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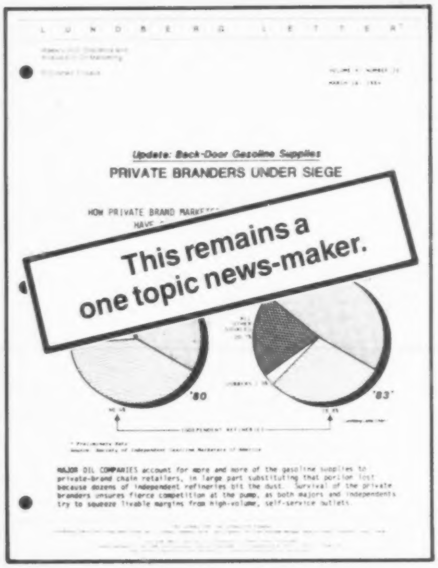

LUNDBERG LETTER

Update: Back-Door Gasoline Supplies

PRIVATE BRANDERS UNDER SIEGE

'80

'83

MAJOR OIL COMPANIES account for more and more of the gasoline supplies to private-brand chain retailers, in large part substituting that portion lost because dozens of independent refineries bit the dust. Survival of the private branders insures fierce competition at the pump, as both majors and independents try to squeeze livable margins from high-volume, self-service outlets.

This remains a one topic news-maker.

Goes to bed Fridays like all good little newsletters.

Goes to bed Tuesday nights!

Lundberg INWEEK Letter

Volume 1 Number 2 · April 10, 1984

GRADE WEIGHTS
SHARE OF U.S. SALES

Product Pipeline Planned

Stuckey's Puts 50 Stores Up for Sale

Charter Cutbacks

Costs of Fire

Distillates Slide

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Who, What and Where in the Capital

On this page you'll find a list of most of the agencies, Congressional committees and lawmakers in Washington responsible for energy policy important to marketers.

Department of Energy

Top-level administrators at DOE are at three different locations in Washington. Headquarters is at the James Forrestal Building, 1000 Independence Avenue, S.W. 20585, but many programs of interest to oil marketers are administered from other DOE locations at 2000 M Street N.W. 20461, and 1200 Pennsylvania Avenue N.W. 20461. Telephone numbers of key officials follow their listing below. The main DOE locator number is (202) 252-5000.

Secretary of Energy: Donald P. Hodel 252-6210
Deputy Secretary: Danny J. Boggs 252-5500
Special Assistant: Chuck Miller 252-5504
Office of Policy, Planning & Analysis: Juan Mares, Director 252-5235
Office of Environmental Protection, Safety and Emergency Preparedness: Dissolved
Economic Regulatory Administration: Ray Hanzlik, Administrator 633-9734
Deputy Administrator: Paul Michael 252-1530
Special Counsel: Economic Regulatory Administration: Milton C. Lorenz 252-8900
Office of Settlements Division: Allen Finkel, Director 252-5665
Office of Fuel Programs: James Workman, Director 252-9356

Environmental Protection Agency

401 M Street S.W. 20460, (202) 382-4355

Administrator: William D. Ruckelshaus
Deputy Administrator: Alvin Alm 382-4700
Assistant Administrator, Enforcement and Compliance Monitoring: Courtney Price 382-4134
Assistant Administrator, Administration and Resource Management: Howard Messner 382-4600
Assistant Administrator, Water: Jack Ravan 382-5700
Assistant Administrator, Solid Waste & Emergency Response: Lee Thomas 382-4610
Inspector General: John Martin 382-4945

Occupational Safety and Health Administration

Department of Labor Building, 200 Constitution Avenue N.W. 20210, (202) 523-9361

Assistant Secretary for Occupational Safety & Health: Vacant
Deputy Assistant Secretary for Occupational Safety & Health: Patrick Tyson
Directorate of Policy, Legislation & Inter-Agency Programs: Anthony Goldin 523-8021
Directorate of Safety Standards Programs: Barry White 523-8061

Federal Trade Commission

Pennsylvania Avenue at Sixth Street N.W. 20580, (202) 523-3830. Economics Bureau is at 2120 L St. N.W. 20580, (202) 634-6881.

Chairman: James C. Miller
Commissioner: Michael Pertschuk 523-3530
Commissioner: Patricia Bailey 523-3525
Commissioner: Terry Calvani 523-3732
Commissioner: George W. Douglas
Director, Bureau of Competition: Timothy J. Muris 523-3601
Director, Bureau of Consumer Protection: Carol T. Crawford 523-3727
Director, Bureau of Economics: Wendy Lee Graham 634-6881
Associate Director, Advertising Practices: Wallace C. Snyder 724-1511
Associate Director, Marketing Practices: Christopher Brewster 523-1642

Congress

Oil-industry representatives testify before many Congressional committees each year, but the bulk of legislation affecting oil marketers is handled by two committees. On the Senate side, the most important is the Energy and Natural Resources Committee, chaired by Sen. James McClure (R-Idaho).

In the House, most energy action important to oil marketers will continue to take place in the Energy Conservation and Power subcommittee of the Energy and Commerce Committee. Following the 1982 Congressional elections, the number of Democrats on the subcommittee was reduced from 14 to 9; the number of Republicans from 10 to 4.

Senate Energy and Natural Resources Committee

5D-360 Dirksen Senate Office Building, 20510, (202) 224-4971
Michael D. Hathaway, staff director.

James A. McClure (R-Idaho), Chairman
Mark O. Hatfield (R-Ore.)
Lowell P. Weicker Jr. (R-Conn.)
Pete V. Domenici (R-N.M.)
Malcolm Wallop (R-Wyo.)
John W. Warner (R-Va.)
Frank H. Murkowski (R-Ark.)
Don Nickles (R-Okla.)
Chic Hecht (R-Nev.)
John H. Chafee (R-R.I.)
John Heinz (R-Pa.)
J. Bennett Johnston (D-La.)
Daniel Evans (D-Wash.)
Dale Bumpers (D-Ark.)
Wendell H. Ford (D-Ky.)
Howard M. Metzenbaum (D-Ohio)
Spark M. Matsunaga (D-Hawaii)
John Melcher (D-Mont.)
Paul E. Tsongas (D-Mass.)
Bill Bradley (D-N.J.)

House Energy and Commerce Committee Subcommittee on Energy Conservation and Power

H2-316 House Office Building, Annex II, 20515, (202) 225-2424
Frank M. Potter Jr., staff director.

Richard Ottinger (D-N.Y.), Chairman
Al Swift (D-Wash.)
Mike Synar (D-Okla.)
Ron Wyden (D-Ore.)
Ralph M. Hall (D-Texas)
John Bryant (D-Texas)
Thomas A. Luken (D-Ohio)
Albert Gore Jr. (D-Tenn.)
John Dingell (D-Mich.)
Carlos Moorhead (R-Calif.)
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Daniel R. Coats (R-Ind.)
James Broyhill (R-N.C.)

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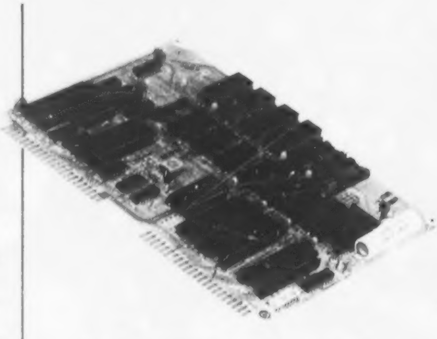

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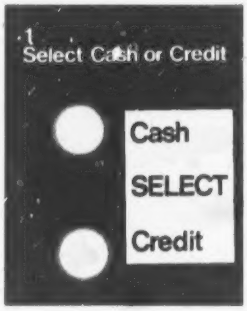

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